"N. B. GROWN"

ADVERTISING EFFECTIVENESS STUDY

Prepared by:

MarCom Incorporated

DEPARTMENT OF AGRICULTURE
AND
RURAL DEVELOPMENT
P.O. BOX [illegible], FREDERICTON, N.B.
E3B 5H1

NEW BRUNSWICK
NOUVEAU-BRUNSWICK

[illegible] OF AGRICULTURE
ET DU
DEVELOPPEMENT RURAL
[illegible], N.B.
E3B 5H1

January 6, 1981

Mr. Gerald R. Birt, Manager
Marketing and Public Relations
Marcom Incorporated
P. O. Box 2193
Charlottetown, P.E.I.
C1A 8B9

Dear Mr. Birt:

I am pleased to inform you that Marcom Incorporated has been chosen to conduct the evaluation of the New Brunswick Department of Agriculture and Rural Development's "Home Grown" program.

I understand that the project will be done at a cost of $7,950.00 and will be carried out as described in your proposal and in discussions held here in Fredericton on December 18, 1980.

I have met with Dana Clendenning a few times and the English questionnaire has been approved. I expect the French version to be delivered here today and hopefully approved by tomorrow.

If there are any further questions, please give me a call.

Yours truly,

Michael McCormick
Market Information Officer
Market Development Branch

MM/cs

Our Best Belongs to You [illegible] Vous

"N. B. GROWN"

ADVERTISING EFFECTIVENESS STUDY

Prepared for:

New Brunswick Department of
Agriculture & Rural Development

Prepared by:

MarCom Incorporated

500 Beaverbrook Court
Fredericton, New Brunswick

February 4, 1981

MarCom
MarCom Incorporated
500 Beaverbrook Court
Fredericton
New Brunswick
Canada E3B 5X4

February 4, 1981

Mr. Michael McCormick
Market Information Officer
Market Development Branch
Department of Agriculture &
Rural Development
P.O. Box 6000
Fredericton, N.B.
E3B 5H1

Dear Mr. McCormick:

We are pleased to enclose the final report of the "N. B. Grown" Advertising Effectiveness Study which you authorized us to do on January 6, 1981.

As you requested, the evaluation is based upon results of telephone surveys of New Brunswick consumers which we conducted in early January as well as a number of personal interviews with retailers throughout the province. The 1980 promotional efforts have resulted in increased awareness of "N. B. Grown" products and have formed a strong base for the achievement of impressive gains in 1981 if the appropriate action is taken.

We have appreciated the opportunity of assisting you with the evaluation of the "N. B. Grown" program. If you have any further questions, do not hesitate to call us.

We look forward to working with you again.

Yours truly,

MARCOM INCORPORATED

Per: Douglas MacArthur

Douglas M. MacArthur
President

DMM/cl
Enclosure

Telephone (506) 454-1615
Telex 014-46208

TABLE OF CONTENTS

LETTER OF TRANSMITTAL ii

LIST OF TABLES iv

EXECUTIVE SUMMARY x

INTRODUCTION 1

CONSUMER SURVEY # 3 2

- Introduction 3
- Methodology 3
- Results 7
- Summary 39

RETAIL SURVEY 41

- Introduction 42
- Methodology 42
- Results 43
- Summary 72

COMPARATIVE ANALYSIS OF SURVEY RESULTS 74

- Introduction 75
- Results 76
- Summary 97

SUMMARY & CONCLUSIONS 98

APPENDIX "A" - Sample Consumer Questionnaires Surveys # 1, 2 & 3 101

APPENDIX "B" - Sample Retail Questionnaire .. 127

APPENDIX "C" - Consumer Survey # 2 Results .. 133

LIST OF TABLES

Table 1 - Consumer Survey #3
Respondent With/Without Locational Preference
(By Region and Mother Tongue) 14

Table 2 - Consumer Survey #3
Respondent's Choice Influenced By Source of Supply
(By Region and Mother Tongue) 15

Table 3 - Consumer Survey #3
Respondent's Preferred Source of Supply
(By Region and Mother Tongue) 16

Table 4 - Consumer Survey #3
Quality Image of N.B. Agricultural Food Products
(By Region and Mother Tongue) 17

Table 5 - Consumer Survey #3
Price Image of N. B. Agricultural Food Products
(By Region and Mother Tongue) 18

Table 6 - Consumer Survey #3
Supply Image of N. B. Agricultural Food Products
(By Region and Mother Tongue) 19

Table 7 - Consumer Survey #3
Advertising Recall for P.E.I. Agricultural Food Products
(By Region and Mother Tongue) 20

Table 8 - Consumer Survey #3
Advertising Recall for N. B. Agricultural Food Products
(By Region and Mother Tongue) 21

Table 9 - Consumer Survey #3
Recall "Our Best Belongs To You"
(By Region and Mother Tongue) 22

Table 10 - Consumer Survey #3
Recall "N. B. Grown"
(By Region and Mother Tongue) 23

TABLES CON'T

Table 11 - Consumer Survey #3
Respondent's Recall of Agricultural Food Products Advertised
(By Region and Mother Tongue) 24

Table 12 - Consumer Survey #3
Source of Media Recall
(By Region and Mother Tongue) 25

Table 13 - Consumer Survey #3
T. V. Advertising Recall
(By Region and Mother Tongue) 26

Table 14 - Consumer Survey #3
Radio Advertising Recall
(By Region and Mother Tongue) 27

Table 15 - Consumer Survey #3
Newspaper Advertising Recall
(By Region and Mother Tongue) 28

Table 16 - Consumer Survey #3
Store Display Advertising Recall
(By Region and Mother Tongue 29

Table 17 - Consumer Survey #3
When Respondents Last Recall Advertising
(By Region and Mother Tongue) 30

Table 18 - Consumer Survey #3
N. B. Fruits and Vegetables Purchased
(By Mother Tongue) 31

Table 19 - Consumer Survey #3
N. B. Dairy Products Purchased
(By Mother Tongue) 32

Table 20 - Consumer Survey #3
N. B. Meats Purchased
(By Mother Tongue) 33

Table 21 - Consumer Survey #3
N. B. Poultry and Poultry Products Purchased
(By Mother Tongue) 34

TABLES CON'T

Table 22 - Consumer Survey #3
Other N. B. Products Purchased
(By Mother Tongue) 35

Table 23 - Consumer Survey #3
Percentage of N. B. Products
Purchased
(By Region and Mother Tongue) 36

Table 24 - Consumer Survey #3
Sample Demographics 37

Table 25 - Retail Survey
Do Customers ask for N.B. Agri-
cultural Food Products
(By Supermarket) 51

Table 26 - Retail Survey
What N.B. Agricultural Food
Products are Requested the Most
(By Supermarket) 52

Table 27 - Retail Survey
Quality of N.B. Agricultural
Food Products
(By Supermarket) 54

Table 28 - Retail Survey
Price of N.B. Agricultural
Food Products
(By Supermarket) 55

Table 29 - Retail Survey
Supply of N.B. Agricultural
Food Products
(By Supermarket) 56

Table 30 - Retail Survey
Have you Seen or Heard any
Advertising Specifically For N.B.
Agricultural Food Products?
(By Supermarket) 57

Table 31 - Retail Survey
Have you Seen or Read the Slogans
"N.B. Grown" or "Our Best Belongs
To You"
(By Supermarket) 58

TABLES CON'T

Table 32 - Retail Survey
Where Have You Seen or Heard The Slogan Advertised or Identified?
(By Supermarket) 59

Table 33 - Retail Survey
Generally What Do You Recall About The Advertising?
(By Supermarket) 60

Table 34 - Retail Survey
Did You Use Point Of Purchase Material? Do You Feel It Was Effective?
(By Supermarket) 61

Table 35 - Retail Survey
Did You Perceive Any Changes In Buyer Behaviour In 1980 Towards N.B. Agricultural Food Products?
(By Supermarket) 63

Table 36 - Retail Survey
N.B. Fruit And Vegetables Sold As A % Of Total Fruit And Vegetable Sales
(By Supermarket) 64

Table 37 - Retail Survey
N.B. Dairy Products Sold As A % Of Total Sales
(By Supermarket) 65

Table 38 - Retail Survey
N.B. Poultry and Poultry Products Sold As A % Of Total Sales
(By Supermarket) 66

Table 39 - Retail Survey
N.B. Meat Sold As A % Of Total Sales
(By Supermarket) 67

Table 40 - Retail Survey
What Is The Most Effective Form Of Advertising Agricultural Food Products.
(By Supermarket) 68

TABLES CON'T

Table 41 - Retail Survey
What Is The Most Effective Form Of Advertising Agricultural Food Products?
(By Supermarket) 69

Table 42 - Retail Survey
What Messages Should Be Conveyed When Advertising N.B. Agricultural Food Products
(By Supermarket) 70

Table 43 - Consumer Survey
Comparative Analysis
Respondents With/Without Locational Preference
(By Mother Tongue) 80

Table 44 - Consumer Survey
Comparative Analysis
Respondents Choice Influenced By Source of Supply
(By Mother Tongue) 81

Table 45 - Consumer Survey
Comparative Analysis
Respondents Preferred Source Of Supply
(By Mother Tongue) 82

Table 46 - Consumer Survey
Comparative Analysis
Quality Image Of N.B. Agricultural Food Products
(By Mother Tongue) 83

Table 47 - Consumer Survey
Comparative Analysis
Price Image Of N.B. Agricultural Food Products
(By Mother Tongue) 84

Table 48 - Consumer Survey
Comparative Analysis
Supply Image Of N.B. Agricultural Food Products
(By Mother Tongue) 85

TABLES CON'T

Table 49 - Consumer Survey
Comparative Analysis
Advertising Recall For N.B.
Agricultural Food Products
(By Mother Tongue) 86

Table 50 - Consumer Survey
Comparative Analysis
Recall "N.B. Grown"
(By Mother Tongue) 87

Table 51 - Consumer Survey
Comparative Analysis
Respondents Recall Agricultural
Food Products Advertised
(By Mother Tongue) 88

Table 52 - Consumer Survey
Comparative Analysis
Source Of Media Recall
(By Mother Tongue) 90

Table 53 - Consumer Survey
Comparative Analysis
Newspaper Advertising Recall
(By Mother Tongue) 92

Table 54 - Consumer Survey
Comparative Analysis
Store Display Advertising Recall
(By Mother Tongue) 93

Table 55 - Consumer Survey
Comparative Analysis
% Of N.B. Products Purchased
(By Mother Tongue) 94

Table 56 - Consumer Survey
Comparative Analysis
Radio Advertising Recall
(By Mother Tongue) 96

EXECUTIVE SUMMARY

The objective of this study has been to determine the effectiveness of the "N. B. Grown" promotional effort of the New Brunswick Department of Agriculture & Rural Development. Our approach was to interview three hundred and thirty-two (332) New Brunswick consumers by telephone as well as twenty (20) retailers on a personal basis and then to compare results of these surveys with two telephone surveys completed by the agriculture department prior to and during the campaign.

The telephone survey was conducted using the Total Design Method for questionnaire construction and survey implementation. A systematic sample of names was drawn from New Brunswick telephone directories with 75% of the study group chosen from the main urban areas of the province and 25% from the rural areas.

Approximately 46% of respondents recalled advertising for New Brunswick agricultural food products. Recall of the slogan "Our Best Belongs To You" tested at 27%

while that of "N. B. Grown" was 65%. These results must be considered, however, in view of the fact that these slogans were confused with the Atlantic Canada Plus campaign, product identification information on the packaging, "local grown" and individual retailer's point of purchase materials.

Respondents primarily recalled advertising for fruits and vegetables and a wide variety of N. B. agricultural food products were used by those surveyed. The most commonly mentioned products included potatoes, carrots, apples, turnips, cabbage, milk, cheese, butter, ice cream, chicken and eggs.

Television appears to have been the most successful media used during the campaign, but point of purchase materials have also played an important role. Only 13% of respondents recalled advertising of any type during the summer and fall of 1980 when the campaign was actively running.

Personal interviews with managers and assistant managers or produce managers of retail food outlets were conducted in four major urban areas of the province. The sample included 15 branch stores of supermarket

chains and 5 other retail food outlets chosen at random.

Support for the "N. B. Grown" campaign by supermarket managers appears to be strong with Dominion store managers being especially enthusiastic. Although the point of purchase materials were rated well by respondents, an insufficient supply of materials was noted quite frequently.

Overall, store managers expressed a high opinion of the quality of New Brunswick products, however, opinions of price and supply could only be considered fair.

Television and newspaper ads are the best form of advertising for agricultural food products according to those managers surveyed. Many suggested that ad content should focus on individual products and convey the message that buying N.B. products helps to support the local economy.

The results of the retail and consumer surveys conducted by our firm were then compared with the results

of the New Brunswick Department of Agriculture & Rural Development surveys. Because of differences in the methodology used in the surveys, there were some difficulties in comparing the results. A number of points were, however, considered appropriate.

The "N. B. Grown" campaign clearly affected New Brunswick consumers. Although the "N. B. Grown" campaign was confused with the "Atlantic Canada Plus" campaign, we do not consider this a serious problem as both campaigns improve the awareness of source of supply to consumers. Increased consumer preference for N. B. products is excellent. The consumers' perception of New Brunswick products is strong on quality and somewhat surprisingly strong on availability. The fact that the relative prices of New Brunswick products is not perceived as favorably as quality or availability should be investigated to determine which product prices are perceived to be too high. Retail interviews confirmed that some N. B. products are higher priced. Possibly this constraint in terms of purchasing can be reduced.

Although the slogan tested very well, the logo does not appear to have achieved good identity as yet.

Given the limited campaign, one would not expect the logo to achieve the identity of, for example, the Atlantic Canada Plus logo. The difficulty in testing recall of a symbol over the telephone must also be considered.

The comparative results do indicate a need for a sustained presence in the marketplace. Ideally, the program should operate year-round with some improvements in material delivery systems (e.g. in-store displays); a rethinking of the 1981 media plan to place greater emphasis on television as the primary media vehicle; and greater coordination between the program and private sector advertisers resulting in improved awareness and market penetration.

In spite of the use of 3 different media each at different times and the limited budget of the campaign, recall and awareness should be considered good to excellent.

Work does, however, need to be done to transfer awareness into actual purchases. In our opinion, 1981 evaluations of this program should concentrate

on purchasing trends in hard dollar terms. The promotional efforts in 1980 have formed a strong base for the achievement of impressive gains in 1981 if appropriate action is taken.

"N. B. GROWN"

ADVERTISING EFFECTIVENESS STUDY

INTRODUCTION

In June 1980, the New Brunswick Department of Agriculture & Rural Development in cooperation with the Department of Regional Economic Expansion, launched the "N. B. Grown" advertising program with the objective of increasing consumer awareness of New Brunswick grown or processed agricultural food products. The objective of the current study was to determine the effectiveness of the "N. B. Grown" promotional effort to date.

We completed telephone interviews with 332 consumers and personal interviews with 20 retailers during the course of the study. A comparison of this survey with those from two previous surveys conducted for the New Brunswick Department of Agriculture & Rural Development was then completed by our staff. We evaluated the effectiveness of the campaign based upon the survey results and the "N. B. Grown" media plan.

CONSUMER SURVEY # 3

Introduction

Our objective in this survey was to examine the awareness of New Brunswick agricultural food products advertising, buying behaviour, etc. following the "N. B. Grown" advertising campaign of the New Brunswick Department of Agriculture & Rural Development. The department had previously conducted two telephone surveys of New Brunswick residents, one prior to the initiation of the campaign and the other while the campaign was in progress. We have conducted this third survey following the completion of the advertising campaign. A total of 332 consumer interviews were completed from January 4, 1981, through January 14, 1981, among a systematically selected sample of households from urban and rural areas of New Brunswick.

Methodology

We conducted the telephone survey using the Total Design Method (TDM) developed by Don A. Dillman, Chairperson of the Department of Rural Sociology and Associate Professor in the Department of Sociology at Washington State University. The TDM approach relies on a theoretical view of why people do and do not respond to questionnaires. It is based upon the premise that to maximize both quantity

and quality of response, attention must be given to every administrative detail that might affect response behaviour.

Design of the questionnaire was our first concern. In order that the results of this survey would be comparable to the previous surveys, the questions used in the second survey were only changed slightly to improve clarity or left unchanged. Although the term agricultural food products, a key term used throughout the questionnaire, was considered to be too complex for a survey of the general public, we hesitated to simplify the phrase. All interviewers were instructed, however, to define this term as necessary. We prepared a new introduction and changed the order of some questions to reduce any resistance to participation. The selection procedure only involved asking to speak to the main food purchaser in each household.

We gave considerable attention to the questionnaire format since it was important to maximize the probability that interviewers would administer it in exactly the same fashion to each respondent. For example, all words and phrases to be read to respondents were typed in lower case letters and interviewer instructions which were never read to respondents were typed in upper case letters, arrows and margins were used for screen questions, etc.

We pre-tested the completed questionnaire with firm colleagues and with an hour of pre-test calls among New Brunswick households. The Department of Agriculture & Rural Development subsequently approved the revised questionnaire in both its English and French translations for use in the survey. Sample questionnaires from this third survey and both previous surveys are included in Appendix A for reference.

A total of 300 completed interviews were required for this survey. We chose a systematic sample* of approximately 650 names (about twice as many as required) from New Brunswick telephone directories. The sample was drawn primarily from urban areas of the province. We assumed that the majority of rural area residents would produce a relatively large proportion of their own fruits and vegetables and that the advertising was directed primarily toward urban residents. Approximately 75% of the sample was chosen from Campbellton, Edmundston, Fredericton, Moncton and Saint John, and 25% from the rest of the province considered primarily rural in nature. The number of interviews required in each urban area was based

---

* Systematic sampling is the process of taking observations at equal intervals in a list. When nearby parts of a population are alike, systematic sampling with a random start is superior to simple random sampling, in spacing the sampling units more evenly over the whole population.

upon the population distribution for these centres. No less than seventeen surveys were required in any one urban center.

INTERVIEW DISTRIBUTION IN URBAN CENTERS

	% POPULATION DISTRIBUTION	SURVEYS REQ'D PER URBAN CENTER	TOTAL SURVEYS REQUIRED
Total Urban			225
Campbellton	3%	17*	
Edmonston	4%	17*	
Fredericton	18%	41	
Moncton	31%	70	
Saint John	44%	99	
TOTAL	100%	244**	225

* Minimum

** Total urban surveys exceeds the 225 surveys required for urban areas (75% of 300) because of the minimum requirement.

The sample from the rural areas of the province was drawn from telephone directory listings for all other areas of the province and the distribution based upon the distribution of residential telephone listings in these areas. The survey distribution was approved by the Department of Agriculture & Rural Development.

The telephone survey was conducted primarily the week of January 4, 1981, with only the final 20 interviews being completed the week of January 11, 1981. Calls were made

from 1 p.m. to 4 p.m. and 6 p.m. to 9 p.m. to minimize the likelihood of calling respondents at objectionable times. During other time periods, calls which had previously resulted in "no answers" or those for which a "call-back" was requested, were completed. The majority of interviews were conducted in English. Approximately sixty interviews were completed in French, however a small number of respondents with French Mother Tongue were interviewed in English.

Results

Time allowed for a total of three hundred & thirty-two surveys to be conducted, slightly over the 319 (244 urban and 25 rural) required for this survey. Frequency distribution and percentage frequency distribution are presented for answers to each question in the tables on the pages 13-37.

Discussion of results is limited at this point to results of questions for which 1) no comparison with previous surveys was possible, 2) peculiarities exist and 3) difficulties with administration were experienced. A further discussion of the results is included in the next section within the comparative analysis of the surveys.

Question 4 *Have you seen any advertising specifically for Prince Edward Island agricultural food products?*

Respondents were questioned regarding advertising of P.E.I. agricultural food products for benchmark and disguise purposes. Approximately 46% of respondents recalled advertising for P.E.I. products, compared to 55% for New Brunswick products.

The majority of respondents recalling the P.E.I. advertising noted that it was for potatoes. Relatively few who recalled New Brunswick advertising made comments concerning products advertised. It is interesting to note that approximately the same proportion of French and English respondents recalled the New Brunswick advertising while 20% fewer French respondents than English recalled the P.E.I. advertising.

Question 5(a) *Have you seen or heard the slogan, "Our Best Belongs To You" advertised or identified on New Brunswick agricultural food products?*

Aided recall of the advertising campaign slogan "Our Best Belongs To You" as measured by this question is not considered to be a good estimate of the media reach for this campaign. This conclusion is based upon the

fact that people often answered "yes" to this question and then proceeded with comments concerning the Atlantic Canada Plus campaign. (See Table 9 Page 22)

Many who recalled the slogan later noted that they had seen or heard the slogan within the last two months, many within the last couple of weeks. The campaign was, however, run primarily during the summer and fall of 1980 (Some producers do still use the "N. B. Grown" logo on packaging).

Some questions concerning details of the advertising recalled also resulted in comments which led us to believe respondents were thinking about the Atlantic Canada Plus ads. For example, "I didn't know beer was produced in New Brunswick until I saw that ad." The Atlantic Canada Plus ad features beer as one of the products produced in Atlantic Canada. Also people noted buying products with the "blue stickers".

Question 5(b) *Have you seen or heard the slogan, "N. B. Grown" advertised or identified on New Brunswick agricultural food products?*

Aided recall of the advertising campaign slogan "N. B. Grown" as measured by this question is also not considered to be an accurate representation of media reach for this

campaign. While 65% of the respondents are aware of "N. B. Grown" being either advertised or identified on New Brunswick products (See Table 10 Page 23), this is not necessarily equivalent to those who saw or heard some portion of the "N. B. Grown" promotional campaign. Approximately 28% of the respondents who recalled either of the two slogans noted that the source of the media recall was "on the packaging." Very few however noted recall of the logo symbol from any of the advertising media. This would indicate that many respondents may have confused the slogan "N. B. Grown" and accompanying symbol with other product information on the packaging such as location of production. It is also significant that Dominion often uses their own "N. B. Grown" sign in their produce department.

The fact that the "N. B. Grown" slogan tested much better than the "Our Best Belongs To You" only serves to emphasize the fact that consumers confused the slogan with other information ("N. B. Grown" slogan and logo were always advertised together with the "Our Best Belongs To You" slogan).

Question 6 *What kinds of agricultural food products have you seen advertised or identified with the slogans, "N.B. Grown" or "Our Best Belongs To You"?*

The majority of respondents (52% of total sample) recalled advertising of fruits and vegetables (See Table 11 Page 24). Potatoes, carrots or apples were the products mentioned most frequently. There seemed to be some confusion among respondents as to products identified with "N. B. Grown" and "local grown."

Question 7 *Where have you seen or heard the slogans advertised or identified?*

Many respondents were not sure of the source of the advertising recalled but after some thought would say, for example, "It must have been T.V." The television was most often (35%) identified as the source of the advertising (See Table 12 Page 25).

Question 8(a) *What do you recall about the television advertisement?*

The slogan was the main characteristic of the T.V. advertising recalled among respondents (See Table 13 Page 26). Of all 117 respondents who identified the T.V. as the source of advertising 39% (45) remembered the slogan and 21% (25) mentioned wording. We must

point out once again, however, that many people appeared to be confusing the Atlantic Canada Plus ads with "N. B. Grown" ads. Some of the wording and visuals recalled were similar to the Atlantic Canada Plus advertisements.

Question 9 *When did you last see or hear the slogans "N. B. Grown" or "Our Best Belongs To You" advertised or identified?*

Respondents were asked when they last recalled advertising of the "N. B. Grown" or "Our Best Belongs To You" slogans. While 21% of respondents could not remember, at least 36% recalled seeing or hearing these slogans during the months of January and December, periods when the "N. B. Grown promotional campaign was not actively running. (See Table 17 Page 30) We understand that some producers are still using the "N. B. Grown" slogan and logo on their packaging. This may account in part for such a large proportion of consumers recalling seeing the advertising recently. Only 13% of all the households surveyed last recalled the advertising during the periods when the T.V., radio and newspaper ads were running in summer '80 and fall '80.

Question 10 *Could you name the fruits and vegetables you buy that are grown or produced in New Brunswick? Dairy products? Meat? Poultry & Poultry Products? Other?*

We used an open question to determine which N.B. products

respondents were purchasing. The number of products mentioned for this question varied depending on how interested respondents were in the interview, and how readily respondents were able to recall the products. Potatoes, carrots, apples, turnips and cabbage were the most frequently noted fruits and vegetables. Milk, cheese (often the Sussex name was noted) butter and ice cream were the most commonly used N.B. dairy products. Numerous consumers noted that they were unaware of the source of production of their meat and that the source was seldom identified. Most respondents reported using N. B. Chicken (61%) and eggs (55%). "Nadeau" chicken was mentioned by many of the respondents. Relatively few respondents mentioned any other of the N.B. agricultural food products available. This can probably be attributed to the fact that consumers did not readily associate honey and maple products, for example, with the agricultural industry.

TABLE 1

CONSUMER SURVEY # 3

Q. 1 RESPONDENT WITH/WITHOUT LOCATIONAL PREFERENCE
(BY REGION AND MOTHER TONGUE)

	TOTAL INTERVIEWS	NO	YES
Total	332 (100%)	187 (56%)	145 (44%)
Region			
Campbellton	17 (100%)	8 (47%)	9 (53%)
Edmundston	20 (100%)	6 (30%)	14 (70%)
Fredericton	42 (100%)	27 (64%)	15 (36%)
Moncton	71 (100%)	39 (55%)	32 (45%)
Saint John	102 (100%)	59 (58%)	43 (42%)
Rural Areas	80 (100%)	48 (60%)	32 (40%)
Mother Tongue			
French	93 (100%)	48 (52%)	45 (48%)
English & Other	239 (100%)	139 (58%)	101 (42%)

Q. 1 Before you purchase agricultural food products, do you generally look to see where they are grown or produced?

TABLE 2

CONSUMER SURVEY # 3

Q. 2 RESPONDENT'S CHOICE INFLUENCED BY SOURCE OF SUPPLY (BY REGION & MOTHER TONGUE)

	TOTAL INTERVIEWS	NO	YES	N/A*
Total	332	30	122	180
	(100%)	(9%)	(37%)	(54%)
Region				
Campbellton	17	2	7	8
	(100%)	(12%)	(42%)	(47%)
Edmundston	20	6	8	6
	(100%)	(30%)	(40%)	(30%)
Fredericton	42	2	13	27
	(100%)	(5%)	(31%)	(64%)
Moncton	71	10	29	32
	(100%)	(14%)	(41%)	(45%)
Saint John	102	4	39	59
	(100%)	(4%)	(38%)	(58%)
Rural Areas	80	6	26	48
	(100%)	(8%)	(32%)	(60%)
Mother Tongue				
French	93	13	32	48
	(100%)	(14%)	(34%)	(52%)
English & Other	239	17	90	132
	(100%)	(7%)	(38%)	(55%)

* N/A includes respondents who did not answer the question as well as those who were not asked because of a previous screen question

Q. 2 Does this make a difference in your choice?

TABLE 3

CONSUMER SURVEY # 3

Q. 2(a) RESPONDENT'S PREFERRED SOURCE OF SUPPLY**
(BY REGION AND MOTHER TONGUE)

	TOTAL INTERVIEWS	LOCAL OR N.B.	ATLANTIC OR MARITIME	CANADIAN	OTHER	N/A*
Total	332 (100%)	73 (22%)	17 (5%)	9 (3%)	24 (7%)	209 (63%)
Region						
Campbellton	17 (100%)	4 (24%)	2 (12%)	0 (0%)	2 (12%)	9 (53%)
Edmundston	20 (100%)	8 (40%)	0 (0%)	0 (0%)	0 (0%)	12 (60%)
Fredericton	42 (100%)	7 (17%)	1 (2%)	3 (7%)	2 (5%)	29 (69%)
Moncton	71 (100%)	17 (24%)	5 (7%)	1 (1%)	6 (9%)	42 (59%)
Saint John	102 (100%)	19 (18%)	6 (6%)	4 (4%)	10 (10%)	63 (62%)
Rural Areas	80 (100%)	18 (23%)	3 (4%)	1 (1%)	4 (5%)	54 (67%)
Mother Tongue						
French	93 (100%)	23 (25%)	3 (3%)	1 (1%)	5 (5%)	61 (66%)
English & Other	239 (100%)	50 (21%)	14 (6%)	8 (3%)	19 (8%)	148 (62%)

* N/A includes respondents who did not answer the question as well as those who were not asked because of a previous screen question.

** The answer categories for this question are based on verbatim replies. The other category includes all other verbatim replies.

Q. 2(a) Why does this make a difference?

TABLE 4

CONSUMER SURVEY # 3

Q. 3(a) QUALITY IMAGE OF N. B. AGRICULTURAL FOOD PRODUCTS (BY REGION & MOTHER TONGUE)

	TOTAL INTERVIEWS	EXCELLENT	GOOD	FAIR	POOR	DON'T KNOW
Total	332	75	211	34	4	8
	(100%)	(23%)	(64%)	(10%)	(1%)	(2%)
Region						
Campbellton	17	3	13	1	-	-
	(100%)	(18%)	(76%)	(6%)	-	-
Edmundston	20	10	8	2	-	-
	(100%)	(50%)	(40%)	(10%)	-	-
Fredericton	42	8	27	3	1	3
	(100%)	(19%)	(64%)	(8%)	(2%)	(7%)
Moncton	71	9	54	7	-	1
	(100%)	(13%)	(76%)	(10%)	-	(1%)
Saint John	102	24	59	13	2	4
	(100%)	(23%)	(58%)	(13%)	(2%)	(4%)
Rural Areas	80	21	50	8	1	-
	(100%)	(26%)	(63%)	(10%)	(1%)	-
Mother Tongue						
French	93	27	52	13	-	1
	(100%)	(29%)	(56%)	(14%)	-	(1%)
English & Other	239	48	159	21	4	7
	(100%)	(20%)	(66%)	(9%)	(2%)	(3%)

Q. 3(a) I'd like your opinion of New Brunswick agricultural food products. Could you tell me for each of the following categories whether New Brunswick agricultural food products are excellent, good, fair or poor.

TABLE 5

CONSUMER SURVEY # 3

Q. 3(b) PRICE IMAGE OF N. B. AGRICULTURAL FOOD PRODUCTS (BY REGION & MOTHER TONGUE)

	TOTAL INTERVIEWS	EXCELLENT	GOOD	FAIR	POOR	DON'T KNOW
Total	332	7	133	148	33	11
	(100%)	(2%)	(40%)	(45%)	(10%)	(3%)
Region						
Campbellton	17	2	7	7	1	-
	(100%)	(12%)	(41%)	(41%)	(6%)	-
Edmundston	20	1	7	11	1	-
	(100%)	(5%)	(35%)	(55%)	(5%)	-
Fredericton	42	1	21	15	2	3
	(100%)	(2%)	(50%)	(36%)	(5%)	(7%)
Moncton	71	-	28	30	11	2
	(100%)	-	(39%)	(42%)	(16%)	(3%)
Saint John	102	1	41	46	8	6
	(100%)	(1%)	(40%)	(45%)	(8%)	(6%)
Rural Areas	80	2	29	39	10	-
	(100%)	(3%)	(36%)	(49%)	(12%)	-
Mother Tongue						
French	93	3	28	48	13	1
	(100%)	(3%)	(30%)	(52%)	(14%)	(1%)
English & Other	239	4	105	100	20	10
	(100%)	(2%)	(44%)	(42%)	(8%)	(4%)

Q. 3(b) *I'd like your opinion of New Brunswick agricultural food products. Could you tell me for each of the following categories whether New Brunswick agricultural food products are excellent, good, fair or poor.*

TABLE 6

CONSUMER SURVEY # 3

Q. 3(c) SUPPLY IMAGE OF N. B. AGRICULTURAL FOOD PRODUCTS (BY REGION & MOTHER TONGUE)

	TOTAL INTERVIEWS	EXCELLENT	GOOD	FAIR	POOR	DON'T KNOW
Total	332	34	184	93	6	15
	(100%)	(10%)	(55%)	(28%)	(2%)	(5%)
Region						
Campbellton	17	3	13	1	-	-
	(100%)	(18%)	(76%)	(6%)	-	-
Edmundston	20	2	8	10	-	-
	(100%)	(10%)	(40%)	(50%)	-	-
Fredericton	42	6	23	9	-	4
	(100%)	(14%)	(55%)	(21%)	-	(10%)
Moncton	71	2	51	13	1	4
	(100%)	(3%)	(72%)	(18%)	(1%)	(6%)
Saint John	102	11	46	34	4	7
	(100%)	(11%)	(45%)	(33%)	(4%)	(7%)
Rural Areas	80	10	43	26	1	-
	(100%)	(12%)	(54%)	(33%)	(1%)	-
Mother Tongue						
French	93	12	50	29	-	2
	(100%)	(13%)	(54%)	(31%)	-	(2%)
English & Other	239	22	134	64	6	13
	(100%)	(9%)	(56%)	(27%)	(3%)	(5%)

Q. 3(c) *I'd like your opinion of New Brunswick agricultural food products. Could you tell me for each of the following categories whether New Brunswick agricultural food products are excellent, good, fair or poor.*

TABLE 7

CONSUMER SURVEY # 3

Q. 4(a) ADVERTISING RECALL FOR P.E.I. AGRICULTURAL FOOD PRODUCTS (BY REGION & MOTHER TONGUE)

	TOTAL INTERVIEWS	NO	YES	N/A*
Total	332	177	154	-
	(100%)	(53%)	(46%)	
Region				
Campbellton	17	17	6	-
	(100%)	(25%)	(35%)	
Edmundston	20	15	5	-
	(100%)	(75%)	(25%)	
Fredericton	42	16	26	-
	(100%)	(38%)	(62%)	
Moncton	71	44	27	-
	(100%)	(62%)	(38%)	
Saint John	102	38	63	1
	(100%)	(37%)	(62%)	(1%)
Rural Areas	80	53	27	-
	(100%)	(66%)	(34%)	
Mother Tongue				
French	93	66	27	-
	(100%)	(71%)	(29%)	
English & Other	239	111	127	1
	(100%)	(47%)	(53%)	-

* N/A includes respondents who did not answer the question as well as those who were not asked because of a previous screen question.

Q. 4(a) Have you seen any advertising specifically for Prince Edward Island agricultural food products?

TABLE 8

CONSUMER SURVEY # 3

Q. 4(b) ADVERTISING RECALL FOR N.B. AGRICULTURAL FOOD PRODUCTS (BY REGION & MOTHER TONGUE)

	TOTAL INTERVIEWS	NO	YES	N/A*
Total	332 (100%)	148 (45%)	183 (55%)	1
Region				
Campbellton	17 (100%)	6 (35%)	11 (65%)	-
Edmundston	20 (100%)	8 (40%)	12 (60%)	-
Fredericton	42 (100%)	17 (40%)	25 (60%)	-
Moncton	71 (100%)	32 (45%)	39 (55%)	-
Saint John	102 (100%)	50 (49%)	51 (50%)	1 (1%)
Rural Areas	80 (100%)	35 (45%)	45 (55%)	-
Mother Tongue				
French	93 (100%)	43 (46%)	50 (54%)	-
English & Other	239 (100%)	105 (44%)	133 (56%)	1 -

* N/A includes respondents who did not answer the question as well as those who were not asked because of a previous screen question.

Q. 4(b) What about for New Brunswick agricultural food products?

TABLE 9

CONSUMER SURVEY # 3

Q. 5(a) RECALL "OUR BEST BELONGS TO YOU"
(BY REGION & MOTHER TONGUE)

	TOTAL INTERVIEWS	NO	YES	N/A*
Total	332	238	91	3
	(100%)	(72%)	(27%)	(1%)
Region				
Campbellton	17	14	3	0
	(100%)	(82%)	(18%)	(0%)
Edmundston	20	18	2	0
	(100%)	(80%)	(10%)	(0%)
Fredericton	42	29	13	0
	(100%)	(69%)	(31%)	(0%)
Moncton	71	49	22	0
	(100%)	(69%)	(31%)	(0%)
Saint John	102	71	28	3
	(100%)	(70%)	(27%)	(3%)
Rural Areas	80	57	23	0
	(100%)	(71%)	(29%)	(0%)
Mother Tongue				
French	93	67	26	0
	(100%)	(72%)	(30%)	(0%)
English & Other	239	171	65	3
	(100%)	(72%)	(27%)	(3%)

* N/A includes respondents who did not answer the question as well as those who were not asked because of a previous screen question.

Q. 5(a) *Have you seen or heard the slogan, "Our Best Belongs To You" advertised or identified on New Brunswick agricultural food products?*

TABLE 10

CONSUMER SURVEY # 3

Q. 5(b) RECALL "N. B. GROWN"
(BY REGION & MOTHER TONGUE)

	TOTAL INTERVIEWS	NO	YES	N/A*
Total	332	114	215	3
	(100%)	(34%)	(65%)	(1%)
Region				
Campbellton	17	7	10	0
	(100%)	(41%)	(59%)	(0%)
Edmundston	20	7	13	0
	(100%)	(35%)	(65%)	(0%)
Fredericton	42	10	32	0
	(100%)	(24%)	(76%)	(0%)
Moncton	71	27	44	0
	(100%)	(38%)	(62%)	(0%)
Saint John	102	36	64	2
	(100%)	(35%)	(63%)	(2%)
Rural Areas	80	27	52	1
	(100%)	(34%)	(65%)	(1%)
Mother Tongue				
French	93	49	44	0
	(100%)	(53%)	(47%)	(0%)
English & Other	239	65	171	3
	(100%)	(27%)	(72%)	(1%)

* N/A includes respondents who did not answer the question as well as those who were not asked because of a previous screen question.

Q. 5(b) *Have you seen or heard the slogan, "N. B. Grown" advertised or identified on New Brunswick agricultural food products?*

TABLE 11

CONSUMER SURVEY # 3

Q. 6 RESPONDENT'S RECALL OF AGRICULTURAL FOOD PRODUCTS ADVERTISED (BY REGION & MOTHER TONGUE)

	TOTAL** INTERVIEWS	FRUITS & VEGETABLES	POULTRY	DAIRY	MEAT	HONEY & MAPLE PRODUCTS	TWO OR MORE PRODUCTS	DON'T KNOW	N/A*
Total**	332	174	23	13	19	2	57	97	42
	(100%)	(52%)	(7%)	(4%)	(6%)	(1%)	(42%)	(17%)	(28%)
Region									
Campbellton	17	8	2	1	2	-	5	3	6
	(100%)	(47%)	(12%)	(6%)	(12%)	-	(29%)	(18%)	(35%)
Edmundston	20	12	3	2	4	-	5	1	7
	(100%)	(60%)	(15%)	(10%)	(20%)	-	(25%)	(1%)	(35%)
Fredericton	42	27	2	-	1	1	3	7	7
	(100%)	(64%)	(5%)	-	(2%)	(2%)	(7%)	(19%)	(17%)
Moncton	71	25	5	4	5	-	10	17	25
	(100%)	(35%)	(7%)	(6%)	(7%)	-	(14%)	(24%)	(35%)
Saint John	102	52	7	1	-	-	7	21	29
	(100%)	(51%)	(7%)	(1%)	-	-	(7%)	(21%)	(28%)
Rural Areas	80	50	4	5	7	1	12	7	23
	(100%)	(62%)	(5%)	(6%)	(9%)	(1%)	(15%)	(9%)	(29%)
Mother Tongue									
French	93	38	7	3	12	1	19	10	42
	(100%)	(41%)	(8%)	(4%)	(13%)	(1%)	(20%)	(11%)	(45%)
English & Other	239	136	16	10	7	1	23	47	55
	(100%)	(57%)	(7%)	(4%)	(3%)	-	(10%)	(20%)	(23%)

** Totals do not necessarily equal total number of interviews due to multiple answers.

* N/A includes respondents who did not answer the question as well as those who were not asked because of a previous screen question.

Q. 6 *What kinds of agricultural food products have you seen advertised or identified with the slogans, "N.B. Grown" or "Our Best Belongs To You"?*

TABLE 12

CONSUMER SURVEY # 3

Q. 7 SOURCE OF MEDIA RECALL (BY REGION & MOTHER TONGUE)

	TOTAL ** INTERVIEWS	T.V.	RADIO	NEWS-PAPER	STORE DISPLAY	ON THE PACKAGE	OTHER	DON'T KNOW	N/A*
Total **	332	117	28	60	64	95	4	21	97
	(100%)	(35%)	(8%)	(18%)	(19%)	(29%)	(1%)	(6%)	(29%)
Region									
Campbellton	17	4	1	4	3	2	-	2	6
	(100%)	(24%)	(6%)	(24%)	(18%)	(12%)	-	(12%)	(35%)
Edmundston	20	5	3	3	4	9	1	-	7
	(100%)	(25%)	(15%)	(15%)	(20%)	(45%)	(5%)	-	(35%)
Fredericton	42	17	4	12	15	15	1	4	7
	(100%)	(41%)	(10%)	(29%)	(36%)	(36%)	(2%)	(10%)	(17%)
Moncton	71	26	4	11	14	14	-	4	23
	(100%)	(37%)	(6%)	(15%)	(20%)	(20%)	-	(6%)	(32%)
Saint John	102	29	6	15	14	25	-	5	29
	(100%)	(28%)	(6%)	(15%)	(14%)	(25%)	-	(5%)	(28%)
Rural Areas	80	36	10	15	14	30	2	6	23
	(100%)	(45%)	(13%)	(19%)	(18%)	(38%)	(3%)	(8%)	(29%)
Mother Tongue									
French	93	25	10	15	13	22	2	4	42
	(100%)	(27%)	(11%)	(16%)	(14%)	(24%)	(2%)	(4%)	(45%)
English & Other	239	92	18	45	51	73	2	17	55
	(100%)	(38%)	(8)	(19%)	(21%)	(31%)	(1%)	(7%)	(23%)

**Totals do not necessarily equal total number of interviews due to multiple answers.

*N/A includes respondents who did not answer the question as well as those who were not asked because of a previous screen question.

Q. 7 Where have you seen or heard the slogans advertised or identified?

TABLE 13

CONSUMER SURVEY # 3

Q. 8(a) T. V. ADVERTISING RECALL
(BY REGION & MOTHER TONGUE)

	TOTAL* INTERVIEWS	LOGO SYMBOL	SLOGAN	WORDING	VISUALS	MUSIC	OTHER	DON'T KNOW
Total*	332 (100%)	4 (1%)	45 (14%)	25 (8%)	17 (5%)	6 (2%)	9 (3%)	40 (12%)
Region								
Campbellton	17 (100%)	-	-	-	-	-	-	1 (6%)
Edmundston	20 (100%)	-	3 (15%)	3 (15%)	2 (10%)	-	1 (5%)	1 (5%)
Fredericton	42 (100%)	2 (5%)	10 (24%)	4 (10%)	4 (10%)	3 (7%)	-	5 (12%)
Moncton	71 (100%)	1 (1%)	2 (3%)	4 (6%)	-	-	5 (7%)	17 (24%)
Saint John	102 (100%)	1 (1%)	15 (15%)	6 (6%)	5 (5%)	2 (2%)	2 (2%)	3 (3%)
Rural Areas	80 (100%)	-	15 (19%)	8 (10%)	6 (8%)	1 (1%)	1 (1%)	13 (16%)
Mother Tongue								
French	93 (100%)	-	16 (17%)	10 (11%)	7 (8%)	-	2 (2%)	10 (11%)
English & Other	239 (100%)	4 (2%)	29 (12%)	15 (6%)	10 (4%)	6 (3%)	7 (3%)	30 (13%)

* Totals do not necessarily equal total number of interviews due to multiple answers.

Q. 8 What do you recall about the television advertisement?

TABLE 14

CONSUMER SURVEY # 3

Q. 8(b) RADIO ADVERTISING RECALL
(BY REGION & MOTHER TONGUE)

	TOTAL* INTERVIEWS	SLOGAN	WORDING	LYRICS	MUSIC	OTHER	DON'T KNOW
Total*	332 (100%)	15 (5%)	9 (3%)	2 (1%)	3 (1%)	3 (1%)	11 (3%)
Region							
Campbellton	17 (100%)	-	-	-	-	-	1 (6%)
Edmundston	20 (100%)	1 (5%)	1 (5%)	1 (5%)	-	-	1 (5%)
Fredericton	42 (100%)	2 (5%)	3 (7%)	-	2 (5%)	2 (5%)	-
Moncton	71 (100%)	1 (1%)	-	-	-	-	3 (4%)
Saint John	102 (100%)	4 (4%)	2 (2%)	-	-	-	5 (5%)
Rural Areas	80 (100%)	7 (9%)	3 (4%)	1 (1%)	1 (1%)	1 (1%)	1 (1%)
Mother Tongue							
French	93 (100%)	8 (9%)	6 (6%)	2 (2%)	2 (2%)	1 (1%)	3 (3%)
English & Other	239 (100%)	7 (3%)	3 (1%)	-	1	2 (1%)	8 (3%)

* Totals do not necessarily equal total number of interviews due to multiple answers.

Q. 8(b) What do you recall about the radio advertisement?

TABLE I

CONSUMER SURVEY # 3

Q.8(c) NEWSPAPER ADVERTISING RECALL
(BY REGION & MOTHER TONGUE)

	TOTAL* INTERVIEWS	LOGO SYMBOL	SLOGAN	WORDING	OTHER	DON'T KNOW
Total*	332	3	30	16	5	17
	(100%)	(1%)	(9%)	(5%)	(2%)	(5%)
Region						
Campbellton	17	-	1	1	-	1
	(100%)		(6%)	(6%)		(6%)
Edmundston	20	-	3	1	1	1
	(100%)		(15%)	(5%)	(5%)	(5%)
Fredericton	42	1	6	2	1	5
	(100%)	(2%)	(14%)	(5%)	(2%)	(12%)
Moncton	71	-	4	3	-	5
	(100%)		(6%)	(4%)		(7%)
Saint John	102	1	9	5	2	1
	(100%)	(1%)	(9%)	(5%)	(2%)	(1%)
Rural Areas	80	1	7	4	1	4
	(100%)	(1%)	(9%)	(5%)	(1%)	(5%)
Mother Tongue						
French	93	1	9	7	2	3
	(100%)	(1%)	(10%)	(8%)	(2%)	(3%)
English & Other	239	2	21	9	3	14
	(100%)	(1%)	(9%)	(4%)	(1%)	(6%)

* Totals do not necessarily equal total number of interviews due to multiple answers.

Q. 8(c) What do you recall about the newspaper advertisement?

TABLE 16

CONSUMER SURVEY # 3

Q. 8(d) STORE DISPLAY ADVERTISING RECALL
(BY REGION & MOTHER TONGUE)

	TOTAL * INTERVIEWS	LOGO SYMBOL	SLOGAN	BANNERS	PRICE CARDS	OTHER	DON'T KNOW
Total *	332 (100%)	4 (1%)	28 (8%)	25 (8%)	13 (4%)	8 (2%)	16 (5%)
Region							
Campbellton	17 (100%)	-	-	-	-	-	2 (12%)
Edmundston	20 (100%)	-	2 (10%)	3 (15%)	1 (5%)	-	-
Fredericton	42 (100%)	2 (5%)	8 (19%)	6 (14%)	5 (12%)	1 (2%)	2 (5%)
Moncton	71 (100%)	1 (1%)	2 (3%)	2 (3%)	1 (1%)	1 (1%)	4 (6%)
Saint John	102 (100%)	-	8 (8%)	9 (9%)	2 (2%)	4 (4%)	6 (6%)
Rural Areas	80 (100%)	1 (1%)	8 (10%)	5 (6%)	4 (5%)	2 (3%)	2 (3%)
Mother Tongue							
French	93 (100%)	0	4 (4%)	7 (8%)	4 (4%)	-	3 (3%)
English & Other	239 (100%)	4 (2%)	24 (10%)	18 (8%)	9 (4%)	8 (3%)	13 (5%)

* Totals do not necessarily equal total number of interviews due to multiple answers.

Q. 8(d) What do you recall about the store displays?

TABLE 17

CONSUMER SURVEY # 3

Q. 9 WHEN RESPONDENTS LAST RECALL ADVERTISING
(BY REGION & MOTHER TONGUE)

	TOTAL INTERVIEWS	SUMMER '80	FALL '80	DEC. '80	JAN. '81	DON'T KNOW	N/A*
Total	332	10	34	55	65	69	99
	(100%)	(3%)	(10%)	(16%)	(20%)	(21%)	(30%)
Region							
Campbellton	17	2	-	2	3	3	7
	(100%)	(12%)	-	(12%)	(18%)	(18%)	(41%)
Edmundston	20	2	-	2	8	1	8
	(100%)	(10%)	-	(10%)	(40%)	(5%)	(35%)
Fredericton	42	1	5	5	11	13	8
	(100%)	(2%)	(12%)	(12%)	(26%)	(31%)	(19%)
Moncton	71	2	4	9	13	19	24
	(100%)	(3%)	(6%)	(13%)	(18%)	(25%)	(33%)
Saint John	102	1	14	19	17	22	29
	(100%)	(1%)	(14%)	(19%)	(17%)	(22%)	(28%)
Rural Areas	80	2	11	18	13	12	24
	(100%)	(2%)	(14%)	(22%)	(16%)	(15%)	(30%)
Mother Tongue							
French	93	2	5	4	30	10	44
	(100%)	(2%)	(5%)	(4%)	(32%)	(11%)	(47%)
English & Other	239	1	29	51	35	59	55
	(100%)	(3%)	(12%)	(21%)	(15%)	(25%)	(23%)

* N/A includes respondents who did not answer the question as well as those who were not asked because of a previous screen question.

Q. 9 When did you last see or hear the slogans "N. B. Green" or "Our Best Belongs To You" advertised or identified?

TABLE 18

CONSUMER SURVEY # 3

Q. 10(a) N. B. FRUITS & VEGETABLES PURCHASED (BY MOTHER TONGUE)

	TOTAL*		FRENCH		ENGLISH	
	#	%	#	%	#	%
TOTAL INTERVIEWS*	332	100	93	100	239	100
Apples	169	51	38	41	131	55
Carrots	207	62	67	72	140	59
Potatoes	246	74	81	87	165	69
Cucumbers	40	12	11	12	29	12
Zucchini	1		-		1	
Tomatoes	64	19	13	14	51	21
Pumpkin	7	2	1	1	6	3
Turnips	116	35	38	41	78	33
Parsnips	14	4	3	3	11	5
Squash	50	15	3	3	47	20
Lettuce	30	9	7	8	23	10
Broccoli	17	5	3	3	14	6
Beets	25	8	4	4	21	9
Cauliflower	12	4	2	2	10	4
Strawberries	29	9	6	6	23	10
Corn	30	9	10	11	20	8
Onions	39	12	6	6	33	14
Cabbage	65	20	23	25	42	18
Peas	26	8	4	4	22	9
Beans	28	8	5	5	23	10
Mushrooms	14	4	2	2	12	5
Celery	13	4	3	3	11	5
Plums	6	2	2	2	4	2
Pears	7	2	2	2	5	2
Blueberries	13	4	1	1	12	5
Raspberries	5	2	1	1	4	2
Gooseberries	4	1	-		4	2
Brussel Sprouts	5	2	-		5	2
Summer Savory	3	1	-		3	1
Asparagus	1		-		1	
Peaches	1		-		1	
Fiddleheads	5	2	-		5	2
Greens	6	2	1	1		2
Radish	1		1	1	9	4
Don't Know	12	4	3	3	9	4

* Totals do not necessarily equal total number of interviews due to multiple answers.

Q. 10(a) Could you name the fruits and vegetables you buy that are grown or produced in New Brunswick?

TABLE 19

CONSUMER SURVEY # 3

Q. 10(b) N. B. DAIRY PRODUCTS PURCHASED (BY MOTHER TONGUE)

	TOTAL*		FRENCH		ENGLISH	
	#	%	#	%	#	%
TOTAL INTERVIEWS*	332	100	93	100	239	100
Milk	293	88	70	75	223	93
Ice Cream	88	27	15	16	73	31
Butter	133	40	32	34	101	42
Cheese	164	49	39	42	125	52
Yogurt	27	8	8	9	19	8
Cream	35	11	8	9	27	11
Sour Cream	4	1	1	1	3	1
Cottage Cheese	27	8	1	1	26	11
Buttermilk	6	2	1	1	5	2
Evaporated Milk	7	2	4	4	3	1
Chip Dip	1		-		1	
Eggnog	1		-		1	
Produce Own	3	1	3	3	-	
None	2	1	2	2	-	
Don't Know	2	1	8	9	13	5

* Totals do not necessarily equal total number of interviews due to multiple answers.

Q. 10(b) Could you name the dairy products you buy that are grown or produced in New Brunswick?

TABLE 20

CONSUMER SURVEY # 3

Q. 10(c) N. B. MEATS PURCHASED
(BY MOTHER TONGUE)

	TOTAL*		FRENCH		ENGLISH	
TOTAL INTERVIEWS*	332	100	93	100	239	100
Beef	135	41	44	47	91	38
Pork	119	36	36	39	83	35
Lamb	2	1	1	1	1	
Veal	1		-		1	
Processed Meats	26	8	9	10	17	7
Don't Know	134	40	40	43	94	39
None	6	2	-		6	3
Produce Own	8	2	3	3	5	2

* Totals do not necessarily equal total number of interviews due to multiple answers.

Q. 10(c) Could you name the meat you buy that is grown or produced in New Brunswick?

TABLE 21

CONSUMER SURVEY # 3

Q. 10(d) N. B. POULTRY & POULTRY PRODUCTS PURCHASED (BY MOTHER TONGUE)

	TOTAL*		FRENCH		ENGLISH	
TOTAL INTERVIEWS*	332	100	93	100	239	100
Chicken	204	61	70	75	134	56
Eggs	183	55	44	47	139	58
Turkey	65	20	20	22	45	19
Goose	3	1	-		3	1
Ducks	3	1	2	2	1	
Don't Know	72	22	13	14	59	25
None	3	1	-		3	1
Produce Own	7	2	4	4	3	1

* Totals do not necessarily equal total number of interviews due to multiple answers.

Q. 10(d) Could you name the poultry or poultry products you buy that are grown or produced in New Brunswick?

TABLE 22

CONSUMER SURVEY # 3

Q. 10(e) OTHER N.B. PRODUCTS PURCHASED (BY MOTHER TONGUE)

	TOTAL*		FRENCH		ENGLISH	
TOTAL INTERVIEWS*	332	100	93	100	239	100
Apple Cider	3	1	-		3	1
Flour	2	1	1	1	1	
Maple Products	6	2	1	1	5	2
Molasses	1		-		1	
Bread	4	1	1	1	3	1
Canned Goods	1		-		1	
Honey	11	3	2	2	9	4
Fiddleheads	1		-		1	
Fish	3	1	1	1	3	1
Wine	1		1	1	-	
Deer	1		-		1	
McCains Frozen Foods	5	2	4	4	1	
Rabbits	2	1	2	2	-	
Partridge	1		1	1	-	

* Totals do not necessarily equal total number of interviews due to multiple answers.

Q. 10(e) Could you name any other products you buy that are grown or produced in New Brunswick?

TABLE 23

CONSUMER SURVEY # 3

Q. 11 PERCENTAGE OF N.B. PRODUCTS PURCHASED
(BY REGION & MOTHER TONGUE)

	TOTAL INTERVIEWS	0-15	16-30	31-45	46-60	61-75	76-90	91-100	DON'T KNOW
Total	332	19	32	19	76	67	46	10	63
	(100%)	(6%)	(10%)	(6%)	(23%)	(20%)	(14%)	(3%)	(19%)
Region									
Campbellton	17	1	4	1	4	2	1	-	4
	(100%)	(6%)	(23%)	(6%)	(23%)	(12%)	(16%)		(23%)
Edmundston	20	1	4	1	7	3	1	1	2
	(100%)	(5%)	(20%)	(5%)	(35%)	(15%)	(5%)	(5%)	(10%)
Fredericton	42	2	2	-	14	9	5	2	8
	(100%)	(5%)	(5%)		(33%)	(21%)	(12%)	(12%)	(19%)
Moncton	71	5	5	3	17	10	15	3	13
	(100%)	(7%)	(7%)	(4%)	(24%)	(14%)	(21%)	(4%)	(18%)
Saint John	102	7	8	8	17	22	15	1	24
	(100%)	(7%)	(8%)	(8%)	(17%)	(22%)	(15%)	(1%)	(24%)
Rural Areas	80	3	9	6	17	21	9	3	12
	(100%)	(4%)	(11%)	(8%)	(21%)	(26%)	(11%)	(4%)	(15%)
Mother Tongue									
French	93	3	13	10	27	11	6	2	21
	(100%)	(3%)	(14%)	(11%)	(29%)	(12%)	(6%)	(2%)	(23%)
English & Other	239	16	19	9	49	56	40	8	42
	(100%)	(7%)	(8%)	(4%)	(20%)	(23%)	(17%)	(3%)	(18%)

Q. 11 *You have just listed for me most of the agricultural food products you buy that are produced in New Brunswick. Could you tell me approximately what percentage of all agricultural food products that you buy are New Brunswick products?*

TABLE 24

CONSUMER SURVEY # 3

SAMPLE DEMOGRAPHICS

	TOTAL #	%
TOTAL INTERVIEWS	332	100
Age		
Under 20	6	2
20 - 39	145	44
40 - 49	48	14
50 & Over	132	40
No Answer	1	-
Marital Status		
Single	45	14
Married	254	76
Other	32	10
No Answer	1	-
# of Persons in Household		
1	38	11
2	91	27
3	57	17
4	72	22
5	39	12
6	15	5
6+	19	6
No Answer	1	-
Mother Tongue		
French	93	28
English	236	71
Other	3	1
Sex		
No Answer	6	2
Male	59	18
Female	267	80

SAMPLE DEMOGRAPHICS CON'T
PAGE 2

	TOTAL #	%
Occupation		
Managerial, Professional etc.	87	26
Clerical	11	3
Sales	14	4
Construction	23	7
Primary Occupations	13	4
Processing	0	0
Transportation	14	4
Material Handling & Other Crafts	76	23
Unemployed	15	5
Retired	75	23
Refusal	4	1
Income		
Under $14,000	103	31
$14,000 - $18,000	64	19
$18,000 - $25,000	59	18
$25,000+	57	17
Refusal	34	10
Over $18,000 Refusal	5	2
Don't Know	10	3

Summary

The survey of 332 consumers was completed and results tabulated for all questions. Only a limited discussion of the results is included in this section.

Approximately 46% of respondents recalled advertising for New Brunswick agricultural food products. Some difficulty was experienced in measuring the Advertising recall of specific slogans used in the campaign. The "Our Best Belongs To You" slogan was confused with Atlantic Canada Plus advertising and "N. B. Grown" with product identification information on packaging and "local grown."

Respondents primarily recalled advertising for fruits and vegetables but once again there seemed to be confusion as to product identified with "N. B. Grown" and "local grown."

Results indicate that the T.V. ads were best recalled by the consumers surveyed but recall of ad content and when ads were last noted indicated some confusion with the Atlantic Canada Plus advertising. Only 13% of respondents recalled the "N. B. Grown" ads appearing in summer

'80 and fall '80.

A wide variety of N. B. agricultural products were used by respondents. The most commonly mentioned were potatoes, carrots, apples, turnips, cabbage, milk cheese, butter, ice cream, chicken and eggs.

RETAIL SURVEY

Introduction

In addition to the 332 consumer telephone interviews, a total of 20 personal interviews with managers, assistant managers and produce managers of retail food outlets were conducted during the period from January 6 to January 13. The objectives of the interviews were to determine customer awareness of New Brunswick produced agricultural food products, the effectiveness of the "N. B. Grown" marketing campaign and the opinions of the respondents with respect to the most effective form(s) of advertising for agricultural food products.

Each interview was 15 - 30 minutes in duration and all comments made by the respondents were recorded where possible. Answers and comments were then synthesized and are included in this report.

Methodology

The 20 personal interviews with managers of retail food outlets were conducted in four urban areas of the province as follows:
Saint John; 8, Fredericton; 4, Moncton; 5 , Campbellton; 3.

The number of food outlets in each area (as indicated in Financial Post Survey of Markets) was used as the basis for this breakdown.

Sobey's, Save-Easy, and Dominion stores were supplied with point of purchase material by the New Brunswick Department of Agriculture, for this reason 15 of the 20 interviews were with branch stores from these supermarket chains. The remaining five retail food outlets were chosen at random.

The interviews were conducted using a five page questionnaire which included a combination of closed and open questions to encourage comments from the respondents. A sample questionnaire is included in Appendix B.

Results

Questions 1 & 2 *Q. 1 Do many customers ask for N.B. Agricultural Food Products?*

Q. 2 What N.B. Agricultural Food Products are requested the most?

Retailers noted that customers ask for New Brunswick products fairly often, especially fruit and vegetables. Demand peaks

when the fruits and vegetables are in season. It was mentioned several times that New Brunswick potatoes were requested most frequently, although there were some requests for P.E.I. potatoes. It seems that very few people request New Brunswick dairy products, meat, poultry or poultry products.

Several products are asked for by their brand names such as Stew Pack, Sussex Cheese, Anagance tomatoes and several brands of maple syrup, apple cider and apples.

Question 3 *Q. 3 I would like to have your opinions of New Brunswick Agricultural Food Products. Could you tell me for each of the following categories whether New Brunswick Agricultural Food Products are excellent, good, fair or poor.*

All respondents felt that New Brunswick agricultural food products were good (80%) to excellent (20%) in quality. Among some specific items suggested as being excellent were tomatoes (Anagance), cabbage and turnips. Some quality problems occur with carrots, potatoes and apples especially in the off-season. Western beef was perceived as being slightly better than New Brunswick beef.

Although 65% of respondents felt prices for "N. B. Grown" products were good to excellent, a number of comments were made which would suggest that they are slightly higher than products from out-of-province.

It seems that the supply of New Brunswick agricultural food products is generally quite good depending, of course, on the season for produce. New storage systems may be having an affect by improving year-round supplies.

Questions 4 & 5

Q. 4 *Have you seen or heard any advertising specifically for New Brunswick Agricultural Food Products?*

Q. 5 *Have you seen or heard the slogans "N. B. Grown" or "Our Best Belongs to You" advertised or identified on New Brunswick Agricultural Food Products?*

Dominion and Save Easy stores expressed a very high awareness of the "N. B. Grown" marketing campaign, with 100% having seen or heard the advertising and the great majority of these respondents recalled slogans "N. B. Grown" and "Our Best Belongs To You."

A lower awareness by Sobey's store managers may be due in part to the fact that one of the stores chosen was a member of the Quebec division of Sobey's stores Ltd. and therefore did not receive the point of purchase material which was to be distributed by the head office of the New Brunswick division.

In the "other" category which is a random sample of supermarkets other than Sobey's, Save Easy and Dominion, awareness was also low. Since these stores did not receive point of purchase material, an aided awareness level of approximately 50% should be considered a fair response.

Question 6 Q. 6 *Where have you seen or heard the slogan advertised or identified?*

Although 55% of the respondents mentioned seeing the ads on television, there seemed to be some confusion with the Atlantic Canada Plus marketing campaign and agriculture documentaries. Many respondents mentioned store displays since they had been supplied with point of purchase material by the New Brunswick Department of Agriculture.

Question 7 Q. 7 *Generally, what do you recall about the advertising?*

Answers to this question do not seem to point to a particular advertisement or advertising medium, no comments were mentioned more than once. The answers to this question do point to a higher awareness by the respondents from Sobey's, Save Easy and Dominion, again this may be attributed to the fact that most of these stores received "N. B. Grown" point of purchase material.

Question 8 Q. 8(a) *Did you use the "N. B. Grown" point of purchase material available from the New Brunswick Department of Agriculture?*

(b) *Do you feel the point of purchase material was effective?*

This question was asked of Sobey's, Save Easy and Dominion stores only, as respondents in the "other" category did not receive point of purchase material. Most of the managers did use the store displays (73.3%) and would be quite willing to use them again. The only complaint was that there did not seem to be enough in most cases.

The price cards were considered to be very effective mainly because they were right beside the product. Again it seemed that the stores did not receive enough price cards to meet their needs.

Question 9 Q. 9 *Did you perceive any changes in buyer behaviour in 1980 towards New Brunswick Agricultural Food Products?*

Results of this question suggest that there was little if any change in buyer behaviour in 1980, 60% of the respondents felt there was no change while 15% didn't know. Store managers did seem to feel that consumers have become more aware in recent years of the importance of buying locally produced food.

Question 10 Q. 10(a) *Approximately what percentage of fruits and vegetables that you sell are grown or produced in New Brunswick?*

(b) *What percentage of dairy products?*

(c) *Poultry and poultry products?*

(d) *Meat?*

This question was probably the most difficult for respondents to answer, in fact most did not give any answer

to parts b, c and d. In general terms, however, it seems that most stores carry 30-50% local grown fruits and vegetables, 75-100% locally produced poultry and poultry products and 75-100% New Brunswick diary products. No answer was given by 90% of the respondents to question 10c as many were not sure where their suppliers purchased meat.

Question 11 Q. 11(a) *What form of advertising is or could be most effective in promoting agricultural food products in your opinion?*

(b) *What message or messages do you feel should be conveyed when advertising New Brunswick agricultural food products?*

A majority of respondents (80%) felt television is the most effective form of advertising for agricultural food products. Many also suggested advertising in newspapers in the same section as weekly food ads. Respondents seem supportive of the "N. B. Grown" campaign, those who were familiar with some of the ads felt they were well done and many suggested more saturation of the various media this year.

There were many suggestions as to what messages should be conveyed when advertising agricultural food products,

the fact that purchasing New Brunswick products helps support the local economy was mentioned most often. Good quality products, supporting local growers and provision of employment were also mentioned quite frequently.

TABLE 25

R E T A I L S U R V E Y

Q. 1 DO CUSTOMERS ASK FOR N. B. AGRICULTURAL FOOD PRODUCTS - (BY SUPERMARKET)

ANSWER CATEGORY	DOMINION	SOBEYS	SAVE EASY	OTHER	TOTAL
No	1 (16.7%)	3 (60%)	2 (50%)	2 (40%)	8 (40%)
Yes	5 (83.3%)	2 (40%)	2 (50%)	3 (60%)	12 (60%)
No Answer	-	-	-	-	-
Total Interviews	6 (100%)	5 (100%)	4 (100%)	5 (100%)	20 (100%)

SUMMARY OF COMMENTS

Dominion

- many times;
- potatoes the most;
- "Stew Pack" made in Hampton;
- N.B. cabbage, turnips & carrots;
- Anagance tomatoes;
- N.B. products especially in season;
- sometimes ask for N.B. and P.E.I. potatoes;

Sobeys

- especially when in season;
- some say they would buy N.B. over anything else;
- in fruit and vegetables but not meats;
- do ask for some poultry products;

Save Easy

- if they notice it's N.B. grown, they buy it;
- ask fairly often;
- some ask for P.E.I. potatoes;
- ask very often especially university types;
- some people request Atlantic Canada products;

Q. 1 Do your customers ever ask specifically for N.B. Agricultural Food Products?

TABLE 26

R E T A I L S U R V E Y

Q. 2 WHAT N. B. AGRICULTURAL FOOD PRODUCTS ARE REQUESTED THE MOST - (BY SUPERMARKET)

ANSWER CATEGORY	DOMINION	SOBEYS	SAVE EASY	OTHER	TOTAL*
Fruits & Vegetables	5 (83.3%)	2 (40%)	2 (50%)	3 (60%)	12 (60%)
Dairy Products	1 (16.7%)	-	-	-	1 (5%)
Meat	-	-	-	-	-
Poultry & Poultry Products	-	1 (20%)	1 (25%)	-	2 (10%)
Other	-	-	-	-	-
No Answer	1 (16.7%)	3 (60%)	2 (50%)	2 (40%)	8 (40%)
Total Interviews*	6 (100%)	5 (100%)	4 (100%)	5 (100%)	20 (100%)

*Totals do not necessarily equal total number of interviews due to multiple answers.

SUMMARY OF CONTENTS

Dominion

. request Sussex cheese;
. also request seasonal things like maple syrup & apple cider;

Sobeys

. potatoes especially;

Save Easy

. apples & vegetables requested often;
. like N. B. chicken;

SUMMARY OF COMMENTS (CONT'D)

Other

- ask for apples or potatoes;
- people ask for N.B. products often;
- ask mainly for potatoes;

Q. 2 What N.B. Agricultural Food Products are requested the most?

TABLE 27

R E T A I L S U R V E Y

Q. 3(a) QUALITY OF N. B. AGRICULTURAL FOOD PRODUCTS - (BY SUPERMARKET)

ANSWER CATEGORY	DOMINION	SOBEYS	SAVE EASY	OTHER	TOTAL
Excellent	1 (16.7%)	1 (20%)	1 (25%)	1 (20%)	4 (20%)
Good	5 (83.3%)	4 (80%)	3 (75%)	4 (80%)	16 (80%)
Fair	-	-	-	-	-
Poor	-	-	-	-	-
No Answer	-	-	-	-	-
Total Interviews	6 (100%)	5 (100%)	4 (100%)	5 (100%)	20 (100%)

SUMMARY OF COMMENTS

Dominion

- potatoes often of poor quality;
- cabbage and turnips are excellent, carrots good sometimes;

Save Easy

- Ontario tomatoes are excellent;
- apple quality [illegible] problem;
- western beef is a bit better than ours;

Q. 3(a) I would say the [illegible] Agricultural Food Products. [illegible] because [illegible] products are excellent, good, [illegible]

TABLE 28

R E T A I L S U R V E Y

Q. 3(b) PRICE OF N. B. AGRICULTURAL FOOD PRODUCTS - (BY SUPERMARKET)

ANSWER CATEGORY	DOMINION	SOBEYS	SAVE EASY	OTHER	TOTAL
Excellent	-	-	-	1 (20%)	1 (5%)
Good	4 (66.7%)	4 (80%)	2 (50%)	2 (40%)	12 (60%)
Fair	1 (16.7%)	1 (20%)	1 (25%)	-	3 (15%)
Poor	-	-	1 (25%)	1 (20%)	2 (10%)
No Answer	1 (16.7%)	-	- (25%)	1 (20%)	2 (10%)
Total Interviews	6 (100%)	5 (100%)	4 (100%)	5 (100%)	20 (100%)

SUMMARY OF COMMENTS

Dominion

. price varies with season;

Save Easy

. could buy cheaper from out of province growers as far as produce is concerned;

Other

. potato prices are higher here, can buy cheaper in P.E.I.;
. sometimes N.B. prices higher than other provinces;
. prices follow the market or a bit higher;

Q. 3(b) I would like to know your opinions of New Brunswick Agricultural Food Products. Could you tell me for each of the following categories whether New Brunswick Agricultural Food Products are excellent, good fair or poor.

TABLE 29

R E T A I L S U R V E Y

Q. 3(c) SUPPLY OF N. B. AGRICULTURAL FOOD PRODUCTS - (BY SUPERMARKET)

ANSWER CATEGORY	DOMINION	SOBEYS	SAVE EASY	OTHER	TOTAL
Excellent	-	-	-	1 (20%)	1 (5%)
Good	5 (83.3%)	3 (60%)	2 (50%)	3 (60%)	13 (65%)
Fair	1 (16.7%)	2 (40%)	1 (25%)	1 (20%)	5 (25%)
Poor	-	-	-	-	-
No Answer	-	-	1 (25%)	-	1 (5%)
Total Interviews	6 (100%)	5 (100%)	4 (100%)	5 (100%)	20 (100%)

SUMMARY OF COMMENTS

Dominion

- depends on the season;
- getting so they can get N.B. produce year round because of new storage systems;

Sobeys

- should be better control over supply & marketing boards aren't the answer;
- more than adequate;

Save Easy

- sometimes have to use three or four suppliers to get enough;

Other

- good in season;

2. Not familiar with [illegible] Agricultural Food Products. Could not find out as such at the [illegible] outlets whether the Province's agricultural food products are excellent, good fair or poor.

TABLE 30

R E T A I L S U R V E Y

Q. 4 HAVE YOU SEEN OR HEARD ANY ADVERTISING SPECIFICALLY FOR N. B. AGRICULTURAL FOOD PRODUCTS? - (BY SUPERMARKET)

ANSWER CATEGORY	DOMINION	SOBEYS	SAVE EASY	OTHER	TOTAL
No	-	3 (60%)	-	3 (60%)	6 (30%)
Yes	6 (100%)	2 (40%)	4 (100%)	2 (40%)	14 (70%)
No Answer	-	-	-	-	-
Total Interviews	6 (100%)	5 (100%)	4 (100%)	5 (100%)	20 (100%)

SUMMARY OF COMMENTS

Dominion

. had a big drive in stores pushing "N. B. Grown" a few posters and price cards still up;

Sobeys

. good advertising, likes down home slant but there wasn't enough of it;
. the three Sobeys stores in Dalhousie, Campbellton & Edmundston are part of the Quebec division & therefore did not receive point of purchase material;

Save Easy

. the commercials should mention specific growers and their products as we have some excellent ones, e.g. Andover tomatoes and Balmore mushrooms;

Other

. a potato advertisement;
. ads were colorful and appealing;

Q. 4 Have you seen or heard any advertising specifically for New Brunswick Agricultural Food Products?

TABLE 31

RETAIL SURVEY

Q. 5 HAVE YOU SEEN OR HEARD THE SLOGANS "N. B. GROWN" OR "OUR BEST BELONGS TO YOU" - (BY SUPERMARKET)

ANSWER CATEGORY	DOMINION	SOBEYS	SAVE EASY	OTHER	TOTAL
"N. B. Grown"					
No	-	3 (60%)	1 (25%)	2 (40%)	6 (30%)
Yes	6 (100%)	2 (40%)	3 (75%)	3 (60%)	14 (70%)
Total Interviews	6 (100%)	5 (100%)	4 (100%)	5 (100%)	20 (100%)
"Our Best Belongs To You"					
No	1 (16.7%)	4 (80%)	-	3 (60%)	8 (40%)
Yes	5 (83.3%)	1 (20%)	4 (100%)	2 (40%)	12 (60%)
	-	-	-	-	-
Total Interviews	6 (100%)	5 (100%)	4 (100%)	5 (100%)	20 (100%)

SUMMARY OF COMMENTS

Sobeys

. on point of purchase material:
. on price cards:

Save Easy

. has seen within the last month:

Other

. Dominion has run the logo in newspaper ads:

Q. 5 *Have you seen or heard the slogans "N.B. Grown" or "Our Best Belongs To You" advertised or identified on New Brunswick Agricultural Food Products?*

TABLE 32

RETAIL SURVEY

Q. 6 WHERE HAVE YOU SEEN OR HEARD THE SLOGAN ADVERTISED OR IDENTIFIED? -(BY SUPERMARKET)

ANSWER CATEGORY	DOMINION	SOBEYS	SAVE EASY	OTHER	TOTAL*
Television	4 (66.7%)	2 (40%)	3 (75%)	2 (40%)	11 (55%)
Radio	1 (16.7%)	1 (20%)	1 (25%)	2 (40%)	5 (25%)
Newspaper	3 (50%)	1 (20%)	-	3 (60%)	7 (35%)
Store Displays	5 (83.3%)	2 (40%)	3 (75%)	1 (20%)	11 (55%)
On The Packaging	4 (66.7%)	-	1 (25%)	1 (20%)	6 (30%)
No Answer	-	3 (60%)	-	2 (40%)	5 (25%)
Total Interviews*	6 (100%)	5 (100%)	4 (100%)	5 (100%)	20 (100%)

* Totals do not necessarily equal total number of interviews due to multiple answers.

TABLE 33

R E T A I L S U R V E Y

Q. 7 GENERALLY WHAT DO YOU RECALL ABOUT THE ADVERTISING? - (BY SUPERMARKET)

SUMMARY OF COMMENTS

Dominion

. used the Regent St. store and recognized people from the store;
. remembers part on the farm;
. noticed a full page newspaper ad;
. showed a map of N.B. on T.V. ad;

Sobeys

. the fact that it was promoting a maritime product, it was well done;
. need more saturation;
. noticed because he is in the business;

Save Easy

. noticed because it was something new;
. the slogan "Our Best Belongs To You", they were well done, remembers seeing a fellow driving a tractor through a field;

Other

. T.V. ads had good colour;

TABLE 34

R E T A I L S U R V E Y

Q. 8(a) DID YOU USE POINT OF PURCHASE MATERIAL? Q. 8(b) DO YOU FEEL IT WAS EFFECTIVE? - (BY SUPERMARKET)**

ANSWER CATEGORY	DOMINION	SOBEY'S	SAVE EASY	TOTAL*
8 (a)				
No	-	2 (40%)	2 (50%)	4 (26.7%)
Yes	6 (100%)	3 (60%)	2 (50%)	11 (73.3%)
Total Interviews*	6 (100%)	5 (100%)	4 (100%)	15 (100%)
8 (b)				
No	-	1 (20%)	-	1 (6.8%)
Yes	6 (100%)	2 (40%)	2 (50%)	10 (66.6%)
No Answer	-	2 (40%)	2 (50%)	4 (26.6%)
Total Interviews"	6 (100%)	5 (100%)	4 (100%)	15 (100%)

* Totals do not necessarily equal total number of interviews due to multiple answers.

** (THESE QUESTIONS ASKED OF SOBEY'S, SAVE EASY AND DOMINION ONLY)

SUMMARY OF COMMENTS

Dominion

. price cards most effective because they are right beside product;
. people noticed it & it affected purchases;
. it brought customer attention to N.B. products;
. definitely had an affect, helped sales;

SUMMARY OF COMMENTS (CONT'D)

Save Easy

- it attracted customers' attention;
- would have used it but did not receive enough - only price cards;
- it was appealing and had a good slogan, people are conscious of N.B. products and their importance;

Sobey's

- didn't have enough;
- made customers more aware;
- used just price cards, didn't receive enough;
- did not receive;

Q. 8(a) Did you use the "N. B. Grown" point of purchase material available from the New Brunswick Department of Agriculture?

8(b) Do you feel the point of purchase material was effective?

TABLE 35

R E T A I L S U R V E Y

Q. 9 DID YOU PERCEIVE ANY CHANGES IN BUYER BEHAVIOUR IN 1980 TOWARDS N.B. AGRICULTURAL FOOD PRODUCTS - (BY SUPERMARKET)

ANSWER CATEGORY	DOMINION	SOBEYS	SAVE EASY	OTHER	TOTAL
No	2 (33.3%)	4 (80%)	2 (50%)	4 (80%)	12 (60%)
Yes	2 (33.3%)	-	2 (50%)	1 (20%)	5 (25%)
Did Not Know	2 (33.3%)	1 (20%)	-	-	3 (15%)
Total Interviews	6 (100%)	5 (100%)	4 (100%)	5 (100%)	20 (100%)

SUMMARY OF COMMENTS

Dominion

- on potatoes especially, sold twice as many this year and it could be because of better advertising;
- Atlantic Canada Plus and N.B. Grown are changing people's attitudes;

Save Easy

- asked for N.B. potatoes over P.E.I. more often and they seem to ask for Brand names more often;
- buyers are more aware of importance of buying local grown food;

Other

- sold a lot more local produce if you had a sign or price card over it;
- dependent on what the wholesalers sell the store;

Q. 9 Did you perceive any changes in buyer behaviour in 1980 towards New Brunswick Agricultural Food Products?

TABLE 36

R E T A I L S U R V E Y

Q. 10a N.B. FRUIT & VEGETABLES SOLD AS A %
OF TOTAL FRUIT & VEGETABLE SALES
-(BY SUPERMARKET)

ANSWER CATEGORY	DOMINION	SOBEYS	SAVE EASY	OTHER	TOTAL
0 - 19	-	-	1 (25%)	1 (20%)	2 (10%)
20 - 39	3 (50%)	-	1 (25%)	-	4 (20%)
40 - 59	2 (33.3%)	4 (80%)	1 (25%)	-	7 (35%)
60 - 79	-	-	-	1 (20%)	1 (5%)
80 - 100				1 (20%)	(5%)
No Answer	1 (16.7%)	1 (20%)	1 (25%)	2 (40%)	5 (25%)
Total Interviews	6 (100%)	5 (100%)	4 (100%)	5 (100%)	20 (100%)

Q. 10(a) Approximately what percentage of fruits and vegetables that you sell are grown or produced in New Brunswick?

TABLE 37

R E T A I L S U R V E Y

Q. 10b N.B. DAIRY PRODUCTS SOLD AS A % OF TOTAL SALES -(BY SUPERMARKET)

ANSWER CATEGORY	DOMINION	SOBEYS	SAVE EASY	OTHER	TOTAL
0 - 19	-	-	-	-	-
20 - 39	1 (16.7%)	-	-	-	1 (5%)
40 - 59	-	-	-	1 (20%)	1 (5%)
60 - 79	-	1 (20%)	1 (25%)	-	2 (10%)
80 - 100	-	1 (20%)	2 (50%)	1 (20%)	4 (20%)
No Answer	5 (83.3%)	3 (60%)	1 (25%)	3 (60%)	12 (60%)
Total Interviews	6 (100%)	5 (100%)	4 (100%)	5 (100%)	20 (100%)

Q. 10(b) *Approximately what percentage of [illegible] product was sold as [illegible] product in the supermarket?*

TABLE 38

R E T A I L S U R V E Y

Q. 10c N.B. POULTRY & POULTPY PRODUCTS SOLD AS A % OF TOTAL SALES - (BY SUPERMARKET)

ANSWER CATEGORY	DOMINION	SOBEYS	SAVE EASY	OTHER	TOTAL
0 - 19	-	-	-	-	-
20 - 39	-	-	-	-	-
40 - 59	-	-	-	-	-
60 - 79	-	1 (20%)	-	1 (20%)	2 (10%)
80 - 100	1 (16.7%)	1 (20%)	3 (75%)	1 (20%)	6 (30%)
No Answer	5 (83.3%)	3 (60%)	1 (25%)	3 (60%)	12 (60%)
Total Interviews	6 (100%)	5 (100%)	4 (100%)	5 (100%)	20 (100%)

Q. 10(c) *Approximately what percentage of poultry & poultry products that you sell are grown or produced in New Brunswick?*

TABLE 39

R E T A I L S U R V E Y

Q. 10d N.B. MEAT SOLD AS A % OF TOTAL SALES
- (BY SUPERMARKET)

ANSWER CATEGORY	DOMINION	SOBEYS	SAVE EASY	OTHER	TOTAL
0 - 19	1 (16.7%)	-	-	-	1 (5%)
20 - 39	-	-	-	-	-
40 - 59	-	-	-	1 (20%)	1 (5%)
60 - 79	-	-	-	-	-
80 - 100	-	-	-	-	-
No Answer	5 (83.3%)	5 (100%)	4 (100%)	4 (80%)	18 (90%)
Total Interviews	6 (100%)	5 (100%)	4 (100%)	5 (100%)	20 (100%)

Q. 10d) Approximately what percentage of meat that you sell is ground or produced on your premises?

TABLE 10

RETAIL SURVEY

Q. 11a WHAT IS THE MOST EFFECTIVE FORM OF ADVERTISING AGRICULTURAL FOOD PRODUCTS - (BY SUPERMARKET)

ANSWER CATEGORY	DOMINION	SOBEYS	SAVE EASY	OTHER	TOTAL*
Television	4 (66.7%)	5 (100%)	2 (50%)	5 (100%)	16 (80%)
Newspaper	3 (50%)	2 (40%)	1 (25%)	2 (40%)	8 (40%)
Radio	-	1 (20%)	-	-	1 (20%)
Store Display	2 (33.3%)	-	1 (25%)	2 (40%)	5 (25%)
Package Stickers	-	-	-	1 (20%)	1 (5%)
Total Interviews*	6 (100%)	5 (100%)	4 (100%)	5 (100%)	20 (100%)

*Totals do not necessarily equal total number of interviews due to multiple answers.

Q. 11b What [illegible] is most effective in promoting agricultural food products in your opinion?

TAPLE 11

R E T A I L S U R V E Y

Q. 11a WHAT IS THE MOST EFFECTIVE FORM OF ADVERTISING AGRICULTURAL FOOD PRODUCTS? - (BY SUPERMARKET)

SUMMARY OF COMMENTS

Dominion

- T.V. reaches more people;
- newspaper because everyone goes to it looking for food ads;
- T.V. and point of purchase and it should be the best product possible;
- newspaper and T.V. - newspaper because people scan them for food ads;
- newspaper and in the store;
- T.V. and in the store;

Sobeys

- T.V. during Atlantic Loto and New Brunswick Today;
- Use T.V. and newspaper;
- T.V. because of large audience;
- T.V. and radio would reach more people;
- T.V. and newspaper;

Save Easy

- same as last year but came up with something new showing more of the products available;
- price cards are important, need more than he got this year;
- more T.V.;
- show forms in operation;
- T.V. and more display material;
- newspaper, in same section as weekly food ads;

Other

- T.V. it has more reach and people see the products;
- T.V. and newspaper would reach more people;
- T.V. is # 1 as you can get your point across and reach more people, also point of purchase material;
- T.V., newspaper and store displays also package stickers;
- T.V. at prime times.

TABLE 4.3

R E T A I L - S U R V E Y

Q. 11b. WHAT MESSAGES SHOULD BE CONVEYED WHEN ADVERTISING N.B. AGRICULTURAL FOOD PRODUCTS -(BY SUPERMARKET)

ANSWER CATEGORY	DOMINION	SOBEYS	SAVE EASY	OTHER	TOTAL*
Support Local Economy	1 (16.7%)	1 (20%)	2 (50%)	2 (40%)	6 (30%)
Good Quality	1 (16.7%)	2 (40%)	-	1 (20%)	4 (20%)
Support Growers	-	1 (20%)	1 (25%)	-	2 (10%)
Provides Employment	-	-	-	4 (80%)	4 (20%)
Total Interviews*	6 (100%)	5 (130%)	4 (100%)	5 (100%)	20 (100%)

* Totals do not necessarily equal total number of interviews due to multiple answers.

SUMMARY OF COMMENTS

Dominion

. likes slogan "Our Best Belongs To You";
. helping local economy;
. that the quality is as good as any available;
. could use colour ads in paper;
. highlight individual products and the area in which they are grown;

Sobeys

. freshness and quality as ours are comparable to any but usually fresher;
. support local economy;
. the quality is superior;
. good to support local growers;

Save Easy

. support your local farmer and economy;
. if people bought more local the prices would drop;

SUMMARY OF COMMENTS (CONT'D)

- mainly the fact they are home grown;
- the fact that they are N.B. grown - likes logo;
- home grown and supports local economy;

Other

- jobs it would create;
- keep money here, provides employment;
- that the quality is good and there is a wide variety available;
- provides local employment;
- employment and money remains in province;

Summary

Virtually all store managers expressed support for the "N.B. Grown" marketing campaign. Many of them buy local products as much as possible even though prices seem to the be slightly higher than the market prices. Dominion stores were especially enthusiastic about the campaign and most managers felt it was successful within their own stores. The point of purchase material was felt to be good although it was mentioned quite frequently that there was not enough of it supplied to the store.

Store managers expressed a high opinion of New Brunswick products in terms of quality, while opinions of price and supply could be considered fair. It seems that price and supply vary with the season, while year-round storage systems have helped to improve the quality and availability of many New Brunswick agricultural food products.

Respondents felt that the best forms of advertising for agricultural food products were television and newspaper and that ad content should focus on individual products. Our results suggest that the most important

message to convey is the fact that buying New Brunswick products helps to support the local economy.

COMPARATIVE ANALYSIS

COMPARATIVE ANALYSIS

Introduction

The initial survey (Survey #1) was completed in June, 1980 before the awareness campaign began. A total of 131 respondents were surveyed with all respondents being females between the ages of 20-59. To our knowledge there was no specific geographic breakdown nor were French/English respondents isolated.

The second survey was completed during the summer of August 1980 when the program was operational. A total of 207 respondents were surveyed based on a province-wide sample using telephone books for respondent sources. Forty-six respondents were of French mother tongue and 161 were English.

The third survey was completed in January, 1981 after completion of the campaign and the methodology used has been described earlier in this report. For comparative purposes the sample size in the third survey was large with much more specific demographic breakdowns than the earlier two surveys.

Because of differences in the methodology used in the three surveys there are some difficulties in comparing

the results. A number of general comments however are appropriate.

Results

- Survey #3 showed no major differences in responses from French or English households. Survey #2 did protray major differences. Even allowing for statistical error, our sample was large enough to provide strong evidence that the behavioral patterns of French and English households in New Brunswick towards locally produced supermarket products are similar.

- We are not overly concerned about the apparent confusion between "N. B. Grown" and "Atlantic Canada Plus". The Atlantic Canada Plus campaign can and should be used to reinforce the N. B. Grown marketing effort. Both projects improve the awareness of the importance of source of supply to consumers.

- Survey #2 identified a massive increase in New Brunswick products as a preferred source of supply compared to Survey #1 results. Such an increase could probably be attributed to a number of factors including the advertising and season (in August, locally produced

products would have been abundant in supermarkets, roadside markets, etc). Although this increase should have been reflected in dramatic increases in sales of New Brunswick products, according to the retail interviews, this was not the case nor would one expect them to be given the project's budget. Without hard dollar figures this fact is difficult to substantiate considering that supplies of locally grown products were relatively unchanged from previous years. Sales figures (if available) would probably not indicate the total impact of the advertising in any case. Speed of sale may have improved over previous years, for example, but we have no way of determining this at the present time. The increase in respondents preference for New Brunswick products from Survey #1 and Survey #3 is excellent. We do agree, however, that the increase in sales during the campaign would (or should) be higher than would be the case at this time.

- It is obvious that television has been the most successful media vehicle and this is consistent with findings for similar promotions of this type. The primary reason for this can be generally stated in

in terms of appropriate vehicles for different types of promotion. For example, newspapers are excellent vehicles for promotions in which prices are emphasized or for referral purposes at the customers leisure. This is why supermarkets and theatres are heavy newspaper users. Radio is an excellent medium for impulse purchases and for advertising flexibility. Television is ideally suited to promote an idea as long as frequency is high. Because N. B. Grown is essentially promotion of an idea encompassing a broad umbrella of products, it is likely the best possible vehicle for the N. B. Grown campaign.

- To follow up on the last point, there is little doubt from industry experience that the level of awareness would have increased and had a clearer focus if the entire media budget had been used in television only. It is quite likely that the decision to use television, radio and newspaper, each at different times, and with a limited budget, created some consumer confusion in terms of recall. In spite of this (and there may have been reasons for the decision which we are not aware of) both

recall and awareness should be considered good to excellent and the investment has obviously proven worthwhile.

- Point of purchase materials have played an essential role in the campaign and it is obvious from respondents that the number of supermarket users should be increased as well as increasing the quantity of material supplied to each user.

- The logo was not a strong element in the campaign. It does not appear to achieve the identity of the Atlantic Canada Plus logo, for example. This may be due in part to the limited exposure the logo has received in a campaign with a relatively small budget. The slogan, however, tested very well as did much of the material.

- There are difficulties in interpreting some of the data. For example, we cannot determine with any real degree of certainty if the campaign had a greater impact on increasing the number of consumers who purchased New Brunswick products than on those consumers who already had a tendency to purchase New Brunswick products and who, because of the campaign, purchased increased amounts.

TABLE 43

CONSUMER SURVEY

COMPARITIVE ANALYSIS

RESPONDENTS WITH/WITHOUT
LOCATIONAL PREFERENCE
(BY MOTHER TONGUE)

	SURVEY #1	CHANGE (2-1)	SURVEY #2	CHANGE (3-2)	SURVEY #3	CHANGE (3-1)
	%	%	%	%	%	%
Total (see graph)						
No	57	-40	34	+65	56	-2
Yes	43	+53	66	-33	44	+2
French						
No	-	-	52	0	52	-
Yes	-	-	48	0	48	-
English						
No	-	-	29	+100	58	-
Yes	-	-	71	- 41	42	-

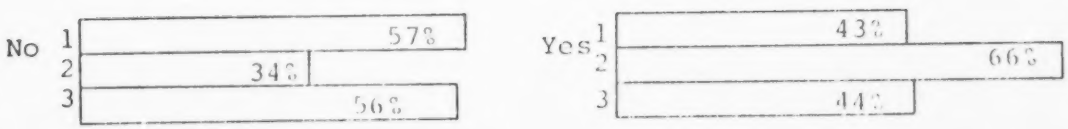


TABLE 44

CONSUMER SURVEY

COMPARITIVE ANALYSIS

RESPONDENTS CHOICE INFLUENCED BY
SOURCE OF SUPPLY
(BY MOTHER TONGUE)

	SURVEY #1	CHANGE (2-1)	SURVEY #2	CHANGE (3-2)	SURVEY #3	CHANGE (3-1)
	%	%	%	%	%	%
Total (see graph)						
No	61	-29	44	+43	63	+3
Yes	39	+44	56	-34	37	-5
French						
No	-	-	65	+2	66	-
Yes	-	-	35	-3	34	-
English						
No	-	-	38	+63	62	-
Yes	-	-	62	-39	38	-

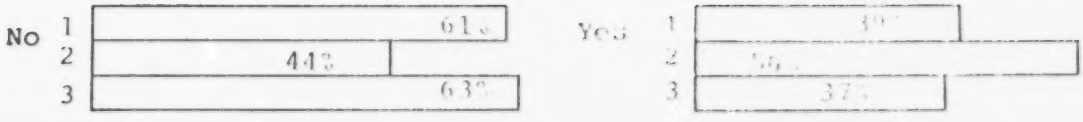


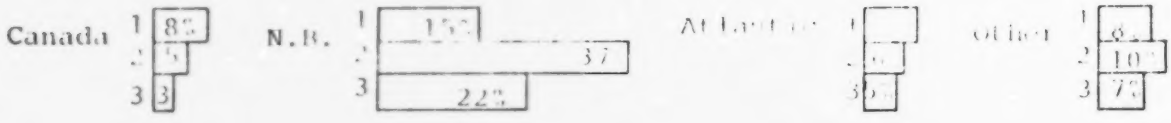
TABLE 45

CONSUMER SURVEY

COMPARITIVE ANALYSIS

RESPONDENTS PREFERRED SOURCE OF SUPPLY
(BY MOTHER TONGUE)

	SURVEY #1	CHANGE (2-1)	SURVEY #2	CHANGE (3-2)	SURVEY #3	CHANGE (3-1)
	%	%	%	%	%	%
Total (see graph)						
Canadian	8	- 38	5	-40	3	-62
N. B.	15	+147	37	-40	22	+47
Atlantic	8	- 25	6	-17	5	-38
Other	8	+ 25	10	-30	7	+12
No Answer	61	- 31	42	+50	63	+ 3
French						
Canadian	-	-	2	-50	1	-
N. B.	-	-	20	+25	25	-
Atlantic	-	-	9	-66	3	-
Other	-	-	6	-16	5	-
No Answer	-	-	63	+ 5	66	-
English						
Canadian	-	-	6	-50	3	-
N. B.	-	-	42	-50	21	-
Atlantic	-	-	6	0	6	-
Other	-	-	11	-27	8	-
No Answer	-	-	35	+77	62	-



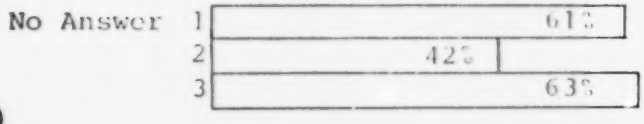


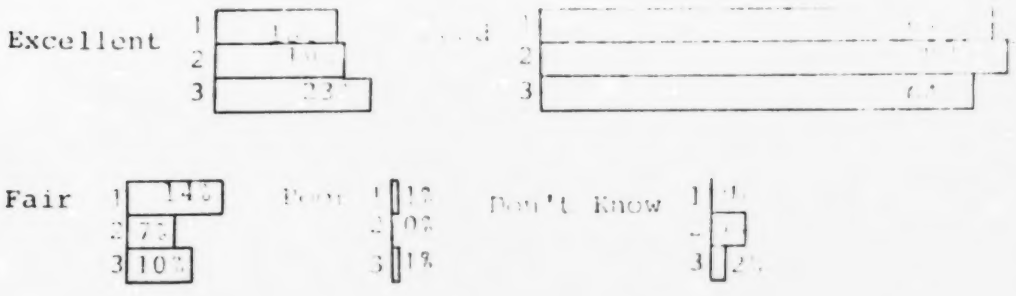
TABLE 46

CONSUMER SURVEY

COMPARITIVE ANALYSIS

QUALITY IMAGE OF
N.B. AGRICULTURAL FOOD PRODUCTS
(BY MOTHER TONGUE)

	SURVEY #1	CHANGE (2-1)	SURVEY #2	CHANGE (3-2)	SURVEY #3	CHANGE (3-1)
	%	%	%	%	%	%
Total (see graph)						
Excellent	18	+ 5	19	+21	23	+28
Good	67	+ 3	69	- 7	64	- 4
Fair	14	- 50	7	+43	10	-29
Poor	1	-100	0	*	1	0
Don't Know	0	*	5	-60	2	-
French						
Excellent	-	-	20	+31	26	-
Good	-	-	63	-11	56	-
Fair	-	-	13	+ 8	14	-
Poor	-	-	0	-	0	-
Don't Know	-	-	4	-75	1	-
English						
Excellent	-	-	19	+ 5	20	-
Good	-	-	71	- 7	66	-
Fair	-	-	5	+80	9	-
Poor	-	-	0	*	0	-
Don't Know	-	-	5	-40	3	-



* Not Defined

TABLE 47

CONSUMER SURVEY

COMPARITIVE ANALYSIS

PRICE IMAGE OF
N.B. AGRICULTURAL FOOD PRODUCTS
(BY MOTHER TONGUE)

	SURVEY #1	CHANGE (2-1)	SURVEY #2	CHANGE (3-2)	SURVEY #3	CHANGE (3-1)
	%	%	%	%	%	%
Total (see graph)						
Excellent	4	-75	1	+100	2	-50
Good	45	+ 2	46	- 13	40	-11
Fair	40	+12	45	0	45	+12
Poor	11	-73	3	+233	10	- 9
Don't Know	0	*	5	- 40	3	*
French						
Excellent	-	-	2	+ 50	3	-
Good	-	-	37	- 19	30	-
Fair	-	-	52	0	52	-
Poor	-	-	9	*	14	-
Don't Know	-	-	9	- 89	1	-
English						
Excellent	-	-	0	*	2	-
Good	-	-	49	- 10	44	-
Fair	-	-	43	- 2	42	-
Poor	-	-	4	+100	8	-
Don't Know	-	-	4	0	4	-

* Not Defined

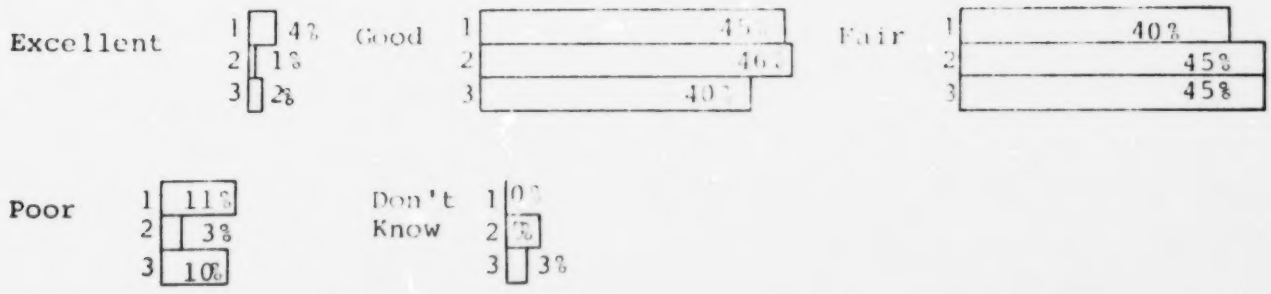


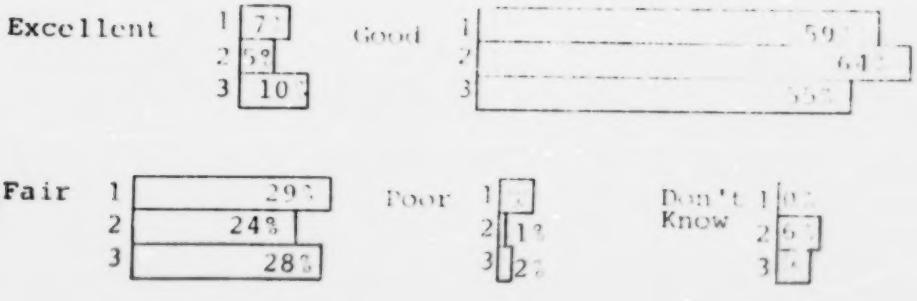
TABLE 18

CONSUMER SURVEY

COMPARITIVE ANALYSIS

SUPPLY IMAGE OF
N.B. AGRICULTURAL FOOD PRODUCTS
(BY MOTHER TONGUE)

	SURVEY #1	CHANGE (2-1)	SURVEY #2	CHANGE (3-2)	SURVEY #3	CHANGE (3-1)
	%	%	%	%	%	%
Total (see graph)						
Excellent	7	-29	5	+100	10	+43
Good	59	+ 8	64	- 14	55	- 7
Fair	29	-17	24	+ 17	28	- 3
Poor	5	-80	1	+100	2	-60
Don't Know	0	*	6	- 17	5	*
French						
Excellent	-	-	0	*	13	-
Good	-	-	57	- 5	54	-
Fair	-	-	37	-16	31	-
Poor	-	-	0	-	0	-
Don't Know	-	-	6	-67	2	-
English						
Excellent	-	-	6	+ 50	9	-
Good	-	-	66	- 15	56	-
Fair	-	-	21	+ 29	27	-
Poor	-	-	1	+200	3	-
Don't Know	-	-	6	- 17	5	-



*Not Defined

TABLE 49

CONSUMER SURVEY

COMPARITIVE ANALYSIS

ADVERTISING RECALL FOR N.B.
AGRIGULTURAL FOOD PRODUCTS
(BY MOTHER TONGUE)

	SURVEY #1	CHANGE (2-1)	SURVEY #2	CHANGE (3-2)	SURVEY #3	CHANGE (3-1)
	%	%	%	%	%	%
Total (see graph)						
No	34	-	-	-	45	+32
Yes	66	-	-	-	55	-17
N/A	0				0	-
French						
No	-	-	-	-	46	-
Yes	-	-		-	54	-
N/A	-	-	-	-	0	-
English						
No	-	-	-	-	44	-
Yes	-	-	-	-	56	-
N/A	-	-	-	-	0	-

TABLE 50

CONSUMER SURVEY

COMPARITIVE ANALYSIS

RECALL "N.B. GROWN"
(BY MOTHER TONGUE)

	SURVEY #1	CHANGE (2-1)	SURVEY #2	CHANGE (3-2)	SURVEY #3	CHANGE (3-1)
	%	%	%	%	%	%
Total (see graph)						
No	-	-	79	- 57	34	-
Yes	-	-	21	+210	65	-
N/A	-	-	0	*	1	-
French						
No	-	-	85	- 38	53	-
Yes	-	-	13	+262	47	-
N/A	-	-	2	-100	0	-
English						
No	-	-	77	- 65	27	-
Yes	-	-	23	+213	72	-
N/A	-	-	0	*	1	-

* Not Defined

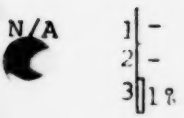


TABLE 51

CONSUMER SURVEY

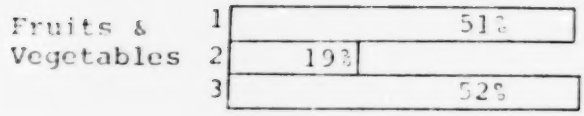
COMPARITIVE ANALYSIS

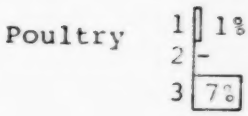
RESPONDENTS RECALL AGRICULTURAL FOOD PRODUCTS ADVERTISED (BY MOTHER TONGUE)

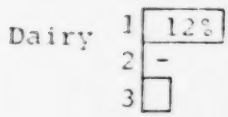
	SURVEY #1	CHANGE (2-1)	SURVEY #2	CHANGE (3-2)	SURVEY #3	CHANGE (3-1)
	%	%	%	%	%	%
Total (see graph)**						
Fruits & Vegetables	51	- 63	19	+374	52	+ 2
Poultry	1	-100	0	*	7	+600
Dairy	12	-100	0	*	4	- 67
Meat	1	-100	0	*	6	+500
Honey & Maple Products	1	-100	0	*	1	0
French						
Fruits & Vegetables	-	-	13	*	41	-
Poultry	-	-	0	*	8	-
Dairy	-	-	0	*	4	-
Meat	-	-	0	*	13	-
Honey & Maple Products	-	-	0	*	1	-
English						
Fruits & Vegetables	-	-	21	+171	57	-
Poultry	-	-	0	*	7	-
Dairy	-	-	0	*	4	-
Meat	-	-	0	*	3	-
Honey & Maple Products	-	-	0	*	-	-

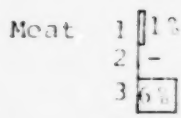
* Not Defined

** Graph next page


Fruits &
Vegetables
1
51%
2
19%
3
52%


Poultry
1
1%
2
-
3
7%


Dairy
1
12%
2
-
3


Meat
1
1%
2
-
3
6%

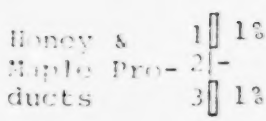

Honey &
Maple Pro-
ducts
1
1%
2
-
3
1%

TABLE 52

CONSUMER SURVEY

COMPARITIVE ANALYSIS

SOURCE OF MEDIA RECALL
(BY MOTHER TONGUE)

	SURVEY #1	CHANGE (2-1)	SURVEY #2	CHANGE (3-2)	SURVEY #3	CHANGE (3-1)
	%	%	%	%	%	%
Total (see graph)**						
TV	27	-100	0	*	35	+ 30
Radio	6	- 83	1	+ 700	8	+ 33
Newspaper	21	- 81	4	+ 350	18	- 14
Store Display	47	- 62	18	+ 5	19	- 60
On The Packaging	13	- 92	1	+2800	29	+123
Other	2	-100	0	*	1	- 50
French						
TV	-	-	0	*	27	-
Radio	-	-	2	+ 470	11	-
Newspaper	-	-	2	+ 700	16	-
Store Display	-	-	11	+ 27	14	-
On the Packaging	-	-	0	*	24	-
Other	-	-	0	*	2	-
English						
TV	-	-	0	*	33	-
Radio	-	-	0	*	8	-
Newspaper	-	-	4	+ 375	19	-
Store Display	-	-	21	0	21	-
On the Packaging	-	-	1	3000	31	-
Other	-	-	0	*	1	-

* Not Defined

** Graph next page

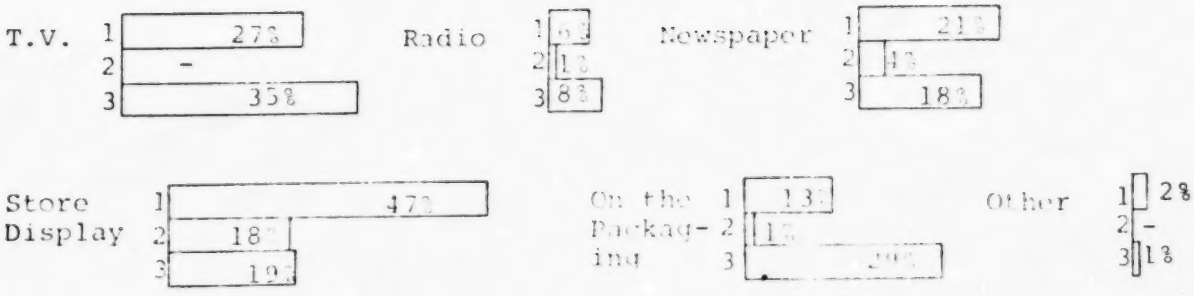

T.V.
1
27%
2
-
3
35%
Radio
1
2
3
8%
Newspaper
1
21%
2
3
18%
Store Display
1
47%
2
18%
3
19%
On the Packaging
1
13%
2
3
Other
1
28
2
-
3
13%

TABLE 53

CONSUMER SURVEY

COMPARITIVE ANALYSIS

NEWSPAPER ADVERTISING RECALL
(BY MOTHER TONGUE)

	SURVEY #1	CHANGE (2-1)	SURVEY #2	CHANGE (3-2)	SURVEY #3	CHANGE (3-1)
	%	%	%	%	%	%
Total (see graph)						
Logo Symbol	-	-	2	- 50	1	-
Slogan	-	-	1	+800	9	-
Wording	-	-	1	+400	5	-
Other	-	-	0	*	2	-
Don't Know	-	-	2	+150	5	-
French						
Logo Symbol	-	-	-	*	1	-
Slogan	-	-	-	*	10	-
Wording	-	-	-	*	8	-
Other	-	-	-	*	2	-
Nothing	-	-	-	*	3	-
English						
Logo Symbol	-	-	3	- 67	1	-
Slogan	-	-	1	+800	9	-
Wording	-	-	2	+100	4	-
Other	-	-	0	*	1	-
Nothing	-	-	3	+100	6	-

* Not Defined

Logo Symbol 1 - 2 2% 3 0% Slogan 1 - 2 1% 3 9% Wording 1 - 2 1% 3 5% Other 1 - 2 0% 3 2%

Don't Know 1 - 2 2% 3 5%

TABLE 54

CONSUMER SURVEY

COMPARITIVE ANALYSIS

STORE DISPLAY ADVERTISING RECALL
(BY MOTHER TONGUE)

	SURVEY #1 %	CHANGE (2-1) %	SURVEY #2 %	CHANGE (3-2) %	SURVEY #3 %	CHANGE (3-1) %
Total (see graph)						
Logo Symbol	-	-	13	- 69	4	-
Slogan	-	-	2	+300	8	-
Banners	-	-	1	+700	8	-
Price Cards	-	-	1	+300	4	-
Other	-	-	0	*	2	-
Don't Know	-	-	6	- 17	5	-
French						
Logo Symbol	-	-	3	-100	0	-
Slogan	-	-	-	*	4	-
Banners	-	-	-	*	7	-
Price Cards	-	-	-	*	4	-
Other	-	-	-	*	-	-
Don't Know	-	-	12	- 75	3	-
English						
Logo Symbol	-	-	24	- 83	4	-
Slogan	-	-	4	+500	24	-
Banners	-	-	2	+800	18	-
Price Cards	-	-	3	+200	9	-
Other	-	-	0	*	8	-
Don't Know	-	-	10	- 80	13	-

* Not Defined

Logo Symbol 1 - 2 13% 3 4%

Slogan 1 - 2 2% 3 8%

Banners 1 - 2 1% 3 8%

Price Cards 1 - 2 1% 3 4%

Other 1 - 2 0% 3 2%

Don't Know 1 - 2 6% 3 5%

TABLE 55

CONSUMER SURVEY

COMPARITIVE ANALYSIS

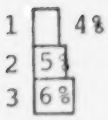
% OF N.B. PRODUCTS PURCHASED
(BY MOTHER TONGUE)

	SURVEY #1	CHANGE (2-1)	SURVEY #2	CHANGE (3-2)	SURVEY #3	CHANGE (3-1)
	%	%	%	%	%	%
Total (see graph)**						
0 - 15	4	+ 25	5	+ 20	6	+50
16 - 30	11	+109	23	- 57	10	- 9
31 - 45	8	+212	25	- 76	6	-25
46 - 60	27	- 37	17	+ 35	23	-15
61 - 75	13	+ 23	16	+ 25	20	+54
76 - 90	27	- 81	5	+180	14	-48
91 - 100	10	-100	0	*	3	-70
Don't Know	0	*	8	138	19	*
French						
0 - 15	-	-	11	- 73	3	-
16 - 30	-	-	24	- 42	14	-
31 - 45	-	-	39	- 11	11	-
46 - 60	-	-	15	+ 93	29	-
61 - 75	-	-	4	+200	12	-
76 - 90	-	-	0	*	6	-
91 - 100	-	-	0	*	2	-
Don't Know	-	-	7	+229	23	-
English						
0 - 15	-	-	4	+ 75	7	-
16 - 30	-	-	23	- 65	8	-
31 - 45	-	-	21	- 81	4	-
46 - 60	-	-	15	+ 33	20	-
61 - 75	-	-	20	+ 15	23	-
76 - 90	-	-	7	+143	17	-
91 - 100	-	-	0	*	3	-
Don't Know	-	-	8	+125	18	-

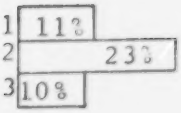
* Not Defined

** Graph next page

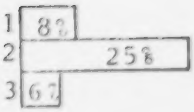
0 - 15



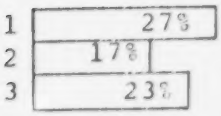
16 - 30



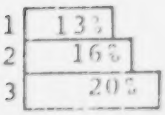
31 - 45



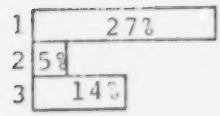
46 - 60



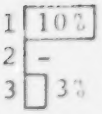
61 - 75



76 - 90



91 - 100



Don't Know

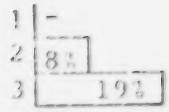


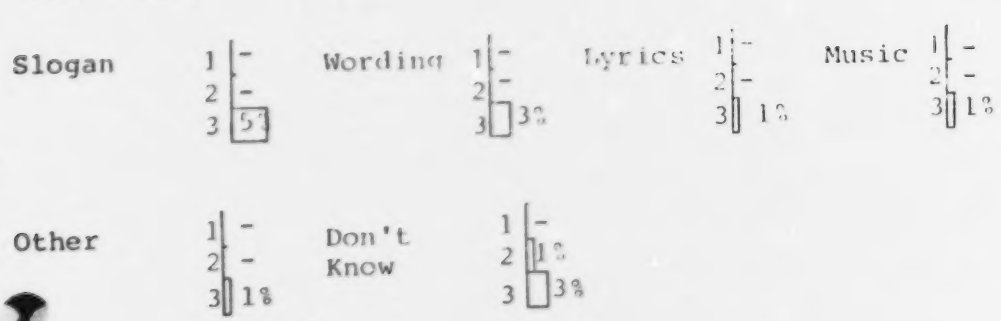
TABLE 56

CONSUMER SURVEY

COMPARITIVE ANALYSIS

RADIO ADVERTISING RECALL
(BY MOTHER TONGUE)

	SURVEY #1	CHANGE (2-1)	SURVEY #2	CHANGE (3-2)	SURVEY #3	CHANGE (3-1)
	%	%	%	%	%	%
Total (see graph)						
Slogan	-	-	0	*	5	-
Wording	-	-	0	*	3	-
Lyrics	-	-	0	*	1	-
Music	-	-	0	*	1	-
Other	-	-	0	*	1	-
Don't Know	-	-	1	+200	3	-
French						
Slogan	-	-	0	*	9	-
Wording	-	-	0	*	6	-
Lyrics	-	-	0	*	2	-
Music	-	-	0	*	2	-
Other	-	-	0	*	1	-
Don't Know	-	-	4	+ 25	3	-
English						
Slogan	-	-	0	*	3	-
Wording	-	-	0	*	1	-
Lyrics	-	-	0	*	0	-
Music	-	-	0	*	0	-
Other	-	-	0	*	1	-
Don't Know	-	-	0	*	3	-



* Not Defined

Summary

As a result of the comparitive analysis, we realize that the N.B. Grown campaign has clearly impacted upon New Brunswick consumers. Although there is some confusion between "N. B. Grown" and "Atlantic Canada Plus" advertising, the campaigns should compliment each other. Increased consumer preference for New Brunswick products is excellent and the slogan tested very well, but the logo appears to need more media exposure to achieve identity. Television has been the most successful media for promoting "N. B. Grown" awareness but point of purchase materials also had significant affect. In spite of the use of three different media, each at different times and the limited budget of the campaign, recall and awareness should be considered good to excellent and the investment has proven worthwhile.

SUMMARY AND CONCLUSIONS

Although our company has completed evaluations (both pre and post testing) such as this in places as far afield as Boston, New York, Calgary, Winnipeg, Toronto and throughout the Atlantic Provinces, we have not encountered so many unique or positive factors as seem to exist in the "N. B. Grown" projects.

Firstly, it is unusual to receive the degree of co-operation we received from respondents in completing such lengthy questionnaires. Similar cooperation existed with retailers interviewed. It is obvious that the project has unusually strong support from both the general citizens and from the New Brunswick food industry. This augers well for the future of the project.

Secondly, Surveys #1 and 2 were essential benchmarks in completing the present evaluation. Although there are methodological problems, these are far outweighed by the data which were available for comparative purposes in completing Survey #3.

Thirdly, our survey results clearly indicate that awareness is increasing but that work needs to be done to

transfer awareness into actual purchases. There is also strong evidence that sufficient public and industry support exists together with governmental co-ordination to achieve rather impressive results on this project.

The comparative results of the three surveys indicate the need for a sustained presence in the marketplace. Ideally the program should operate year-round with some improvements in material delivery systems (e.g. in-store displays); a rethinking of the 1981 media plan to place greater emphasis on television as the primary media vehicle; and greater coordination between the program and private sector advertisers resulting in improved awareness and market penetration.

The surveys also indicate a consumers' perception of New Brunswick products as strong in quality and somewhat surprisingly strong on availability. The fact that the relative price of New Brunswick products is not perceived as favorably as quality or availability should be investigated to determine which product prices are perceived to be too high. Possibly this constraint, in terms of purchasing, can be reduced.

Finally, in terms of evaluation, the survey results are conclusive enough in terms of level of awareness to reduce or eliminate the need for such detailed surveys again in the near future. The surveys have also pointed out those areas which require attention in order to improve program delivery and results. In our opinion, 1981 evaluations of this program should concentrate on purchasing trends in hard dollar terms. In early 1982 the Department should determine, by sample, the level of consumer expenditures on New Brunswick grown products (by type) compared to the same period a year earlier. In our opinion, 1980 promotional efforts have formed a strong base for the achievement of impressive gains in 1981 if appropriate action is taken.

APPENDIX "A"

Hello. My name is _____ of the New Brunswick Department of Agriculture and Rural Development. May I please speak with the main food purchaser of the household?

IF THE PERSON IS THE MAIN FOOD PURCHASER OF THE HOUSEHOLD, CONTINUE.

IF THE PERSON IS NOT THE MAIN FOOD PURCHASER OF THE HOUSEHOLD, ASK TO SPEAK TO HIM OR HER AND INTRODUCE YOURSELF AGAIN.

IF THE MAIN FOOD PURCHASER OF THE HOUSEHOLD IS NOT HOME, THANK THE PERSON YOU ARE TALKING TO AND HANG UP.

We are conducting a survey on agricultural food products and would appreciate a little of your time to answer a few questions. This will only take 8 or 10 minutes, if you are willing to take part in the survey?

YES - CONTINUE NO - TERMINATE

Before we start, I would like to ask you a few questions.

The first four questions have to do with the family doing the purchasing and the remainder with food purchases.

1. Are you?

____ Under 20 years of age _____ 40-59

____ 20-39 _____ 60 and over

2. Are you?

____ Single ____ Married ____ Other

3. How many people are in your family? _____

4. What is the occupation of the household head?

_____

1. Before you purchase agricultural products, do you generally look to see where they are from?

YES ____ NO ____

2. Does this make a difference in your choice?

____ YES - CONTINUE ____ NO - SKIP TO QUESTION 4

3. Why does this make a difference in your choice?

_____

_____

_____

4. What are your impressions of New Brunswick agricultural food products in relation to the following:

Quality	Excellent ____	Good ____	Fair ____	Poor ____
Price	Excellent ____	Good ____	Fair ____	Poor ____
Supply (Availability)	Excellent ____	Good ____	Fair ____	Poor ____

Other _____

_____

5. Have you ever seen agricultural food products advertised or identified as being grown or produced in New Brunswick?

____ YES - continue ____ NO - skip to

6. What kind of agricultural food products have you seen advertised or identified as being grown or produced in New Brunswick?

_____

_____

7. Where have you seen or heard these agricultural food products advertised or identified?

____ Television ____ Radio ____ Newspaper

____ Point of Sale Material ____ On the Packaging ____ Other

8. When did you see or hear these agricultural food products advertised or identified?

_____

9. To the best of your knowledge, which of the following agricultural food products are grown or produced in New Brunswick? Of these, which do you regularly buy?

Apples	____ Purchase	____ Yes	____ No	____ Not Sure
Strawberries	____ Purchase	____ Yes	____ No	____ Not Sure
Raspberries	____ Purchase	____ Yes	____ No	____ Not Sure
Blueberries	____ Purchase	____ Yes	____ No	____ Not Sure
Beans	____ Purchase	____ Yes	____ No	____ Not Sure
Beets	____ Purchase	____ Yes	____ No	____ Not Sure
Cabbage	____ Purchase	____ Yes	____ No	____ Not Sure
Carrots	____ Purchase	____ Yes	____ No	____ Not Sure
Cauliflower	____ Purchase	____ Yes	____ No	____ Not Sure
Corn	____ Purchase	____ Yes	____ No	____ Not Sure
Cucumbers	____ Purchase	____ Yes	____ No	____ Not Sure
Lettuce	____ Purchase	____ Yes	____ No	____ Not Sure
Parsnips	____ Purchase	____ Yes	____ No	____ Not Sure
Tomatoes	____ Purchase	____ Yes	____ No	____ Not Sure

Asparagus	____ Purchase	____ Yes	____ No	____ Not Sure
Broccoli	____ Purchase	____ Yes	____ No	____ Not Sure
Brussel Sprouts	____ Purchase	____ Yes	____ No	____ Not Sure
Celery	____ Purchase	____ Yes	____ No	____ Not Sure
Egg Plant	____ Purchase	____ Yes	____ No	____ Not Sure
Kohlrabi	____ Purchase	____ Yes	____ No	____ Not Sure
Onions	____ Purchase	____ Yes	____ No	____ Not Sure
Parsley	____ Purchase	____ Yes	____ No	____ Not Sure
Peas	____ Purchase	____ Yes	____ No	____ Not Sure
Peppers	____ Purchase	____ Yes	____ No	____ Not Sure
Pumpkin	____ Purchase	____ Yes	____ No	____ Not Sure
Radish	____ Purchase	____ Yes	____ No	____ Not Sure
Rutabaga	____ Purchase	____ Yes	____ No	____ Not Sure
Turnip	____ Purchase	____ Yes	____ No	____ Not Sure
Spinach	____ Purchase	____ Yes	____ No	____ Not Sure
Squash	____ Purchase	____ Yes	____ No	____ Not Sure
Swiss Chard	____ Purchase	____ Yes	____ No	____ Not Sure
Watermelon	____ Purchase	____ Yes	____ No	____ Not Sure
Potatoes	____ Purchase	____ Yes	____ No	____ Not Sure
<u>Dairy Products</u>:				
Milk	____ Purchase	____ Yes	____ No	____ Not Sure
Butter	____ Purchase	____ Yes	____ No	____ Not Sure
Cheese	____ Purchase	____ Yes	____ No	____ Not Sure
Ice Cream	____ Purchase	____ Yes	____ No	____ Not Sure
<u>Meat</u>:				
Beef	____ Purchase	____ Yes	____ No	____ Not Sure
Veal	____ Purchase	____ Yes	____ No	____ Not Sure
Mutton & Lamb	____ Purchase	____ Yes	____ No	____ Not Sure
Pork	____ Purchase	____ Yes	____ No	____ Not Sure
<u>Poultry and Poultry Products</u>:				
Fowl & Chicken	____ Purchase	____ Yes	____ No	____ Not Sure
Turkey	____ Purchase	____ Yes	____ No	____ Not Sure
Geese	____ Purchase	____ Yes	____ No	____ Not Sure
Duck	____ Purchase	____ Yes	____ No	____ Not Sure
Eggs	____ Purchase	____ Yes	____ No	____ Not Sure

Other:

Honey	____ Purchase	____Yes	____ No	____ Not Sure
Maple Products	____ Purchase	____Yes	____ No	____ Not Sure

10. Approximately what percentage of the agricultural food products that you buy are produced or grown in New Brunswick? _____%

11. Would you purchase New Brunswick agricultural products if you could identify them?

_____ Yes - Skip to Ending _____ No - Continue

12. Why not? _____

_____

_____

13. Ending - Thank you very much for your time and co-operation.

14. Sex of Respondent: ____ Male ____ Female

15. Name: _____ Tel. No. _____

Address: _____ City: _____

Interviewer: _____ Date: _____

Length of Interview: _____

SURVEY #2

Hello. My name is _____ of Clarridge House Advertising Ltd. May I please speak with the main food purchaser of the household?

If the person is the main food purchaser of the household, continue.

If the person is not the main food purchaser of the household, ask to speak to him or her and introduce yourself again.

If the main food purchaser of the household is not home, thank the person you are talking to and hang up.

We are conducting a survey on agricultural food products and would appreciate a little of your time to answer a few questions. This will only take 4 or 5 minutes, if you are willing to take part in the survey.

1 ____ YES
2 ____ NO

Before we start, I would like to ask you a few questions.

The first four questions have to do with the family doing the purchasing and the remainder with food purchases.

1. Are you?
   1 ____ under 20 years of age
   2 ____ 20-39
   3 ____ 40-59
   4 ____ 60 and over

2. Are you?
   1 ____ single
   2 ____ married
   3 ____ other

3. How many people are in your family?
   1 ____ 1 member
   2 ____ 2 members
   3 ____ 3 members
   4 ____ 4 members
   5 ____ 5 members
   6 ____ 6 members
   7 ____ more

4. What is the occupation of the household head?

1 ____ labourer
2 ____ skilled labourer
3 ____ professional
4 ____ unemployed
5 ____ retired
6 ____ other
7 ____ salesman

---

1. Before you purchase agricultural products, do you generally look to see where they are from?

1 ____ YES 2 ____ NO

2. Does this make a difference in your choice?

1 ____ YES 2 ____ NO

3. Why does this make a difference?

1 ____ Canadian
2 ____ N. B.
3 ____ Atlantic
4 ____ Other
5 ____ Did not reply

4. What are your impressions of New Brunswick agricultural food products in relation to the following:

Quality 1 ____ Excellent 2 ____ Good 3 ____ Fair 4 ____ Poor
Price 1 ____ Excellent 2 ____ Good 3 ____ Fair 4 ____ Poor
Supply 1 ____ Excellent 2 ____ Good 3 ____ Fair 4 ____ Poor

5. Have you seen the logo, "N. B. Grown", advertised or identified on New Brunswick agricultural food products?

1 ____ YES 2 ____ NO - Skip to Question 10

6. What kinds of agricultural food products have you seed advertised or identified with the logo, N. B. Grown?

1 ____ Fruits and Vegetables
2 ____ Poultry
3 ____ Dairy
4 ____ Meat
5 ____ Honey and Maple Products
6 ____ Did not reply

7. Where have you seen or heard the logo advertised or identified?

1 ___ Television
2 ___ Radio
3 ___ Newspaper
4 ___ Point of Sale Material
5 ___ On the Packaging
6 ___ Other
7 ___ Did Not Reply

8. What do you recall about the radio advertisement?

1 ___ Wording
2 ___ Lyrics
3 ___ Music
4 ___ Other
5 ___ Nothing
6 ___ Did Not Reply

The Newspaper Advertisement:

1 ___ Logo Symbol
2 ___ Logo Slogan
3 ___ Wording
4 ___ Other
5 ___ Nothing
6 ___ Did Not Reply

The Point of Sale Material:

1 ___ Logo Symbol
2 ___ Logo Slogan
3 ___ Banners
4 ___ Price Cards
5 ___ Other
6 ___ Nothing
7 ___ Did Not Reply

9. When did you see or hear the logo, N. B. Grown, advertised or identified?

1 ___ Last Fall
2 ___ Regularly
3 ___ Summer
4 ___ A Few Weeks Ago
5 ___ Last Winter
6 ___ A Few Months Ago
7 ___ Last Week
8 ___ At Night
9 ___ A Few Days Ago
10 ___ Did Not Reply

10. Could you name the fruits and vegetables you buy that are grown or produced in New Brunswick?

_____

_____

_____

_____

Dairy Products _____

_____

Meat _____

_____

Poultry & Poultry Products _____

_____

Other _____

_____

11. Approximately what percentage of agricultural food products that you buy are produced or grown in New Brunswick?

1 ___	10%	7 ___	40%	13 ___	70%	19 ___	100%
2 ___	15%	8 ___	45%	14 ___	75%		
3 ___	20%	9 ___	50%	15 ___	80%		
4 ___	25%	10 ___	55%	16 ___	85%		
5 ___	30%	11 ___	60%	17 ___	90%		
6 ___	35%	12 ___	65%	18 ___	95%		

12. Would you purchase agricultural food products bearing the "N. B. Grown" logo?

1 ____ YES 2 ____ NO

13. Why Not?

1 ____ Depends on the quality and price

2 ____ Prefer other products

3 ____ Doesn't make any difference

4 ____ No Reply

14. Sex of Respondent:

1 ____ MALE 2 ____ FEMALE

15. City _____ Phone No. _____

Bonjour, je m'appele _____. Je travaille pour Clarridge House Advertising Ltd. Est-ce que je peux parler avec celui ou celle qui fait l'achat des aliments pour la famille?

Nous faisons une recherche sur les aliments d'agriculture et nous apprécirions un peu de votre temps pour répondre à quelques questions. Ceci prendrera environs 4 à 5 minutes, si vous êtes d'accord à participer.

1 ____ Continuer 2 ____ Terminer

Avant de commencer d'aimerais de vous poser quelques questions.

1. Estes-vous?
   - 1 ____ sous 20 ans
   - 2 ____ entre 20-39
   - 3 ____ entre 40-59
   - 4 ____ 60 et plus.

2. Etes-vous?
   - 1 ____ célébataire
   - 2 ____ marrier
   - 3 ____ autre

3. Combien de membres dans votre famille?
   - 1 ____ 1 membre
   - 2 ____ 2 membres
   - 3 ____ 3 membres
   - 4 ____ 4 membres
   - 5 ____ 5 membres
   - 6 ____ 6 membres
   - 7 ____ plus que 7 membres

4. Quel est l'occupation de celui ou celle en chef de famille?
   - 1 ___ manoeuvre
   - 2 ___ main d'oeuvre spécialisée
   - 3 ___ professionnel
   - 4 ___ sans travail
   - 5 ___ retirer
   - 6 ___ autre
   - 7 ___ vendeur

---

1. Est-ce que vous regardez l'endroit d'origine des produits d'agriculture que vous achetez.

   1 ____ OUI 2 ____ NON

2. Est-ce que ceci fait une différence dans votre choix?

   1 ____ OUI 2 ____ NON

3. Pourquoi est-ce que ceci fait une différence?

1 ____ Canadiennes
2 ____ Nouveau-Brunswick
3 ____ Atlantique
4 ____ autre
5 ____ n'a rien répondu

4. Quel sont vos impressions des aliments d'agriculture produit au Nouveau-Brunswick en relation de leur.

Qualité	1 ___	excellent	2 ___	bon	3 ___	raisonable	4 ___mauva
Prix	1 ___	excellent	2 ___	bon	3 ___	raisonable	4 ___mauva
Disponibilité	1 ___	excellent	2 ___	bon	3 ___	raisonable	4 ___mauva

5. Avez-vous vu le logo "Cultivé au N.-B." sur les produits d'agriculture du Nouveau-Brunswick?

1 ____ OUI 2 ____ NON - sauter à question 10

6. Quelle sorte de produits d'agriculture avez-vous vu avec le logo, "Cultivé au N.-B."?

1 ___ fruits et légumes
2 ___ volaille
3 ___ produits laitiers
4 ___ viande
5 ___ miel et produits d'érables
6 ___ n'a pas repondu

7. Où avez-vous vu le logo annoncer?

1 ___ télévision
2 ___ radio
3 ___ journal
4 ___ au point de ventre
5 ___ sur le paquet
6 ___ autre
7 ___ n'a rien répondu

8. Qu'est-ce que vous vous souvenez des annonces sur la radio?

1 ___ les mots
2 ___ les paroles lyrique
3 ___ la musique
4 ___ autre
5 ___ rien
6 ___ n'a rien répondu

Qu'est-ce que vous, vous souvenez des annonces dans le journal:

1 ___ le symbole du logo
2 ___ les slogans
3 ___ les mots
4 ___ autre
5 ___ rien
6 ___ n'a rien répondu

Qu'est-ce que vous, vous souvenez des annonces dans les magasins?

1 ___ le symbole du logo
2 ___ les slogans
3 ___ fanions
4 ___ cartes de prix
5 ___ autre
6 ___ rien
7 ___ n'a rien répondu

9. Quand avez-vous vu ou entendu le logo "Cultivé au N.-B." annoncer?

1 ___	l'automne dernier	6 ___	quelques mois passé
2 ___	régulièrement	7 ___	la semaine dernière
3 ___	l'été	8 ___	la nuit
4 ___	quelques semaines passé	9 ___	quelques jour passé
5 ___	l'hiver dernier	10 ___	n'a rien répondu

10. Pouvez-vous nommer les fruits et les légumes que vous achetez qui sont cultivé ou produit au Nouveau-Brunswick?

_____

_____

_____

_____

Produits Laitier _____

_____

Viande _____

_____

Volaille _____

_____

Autre _____

_____

11. A peu près quel pourcentage des aliments d'agriculture que vous achetez sont cultivé ou produit au Nouveau-Brunswick? ____%

1 ___	10%	7 ___	40%	13 ___	70%	19 ___	100%
2 ___	15%	8 ___	45%	14 ___	75%		
3 ___	20%	9 ___	50%	15 ___	80%		
4 ___	25%	10 ___	55%	16 ___	85%		
5 ___	30%	11 ___	60%	17 ___	90%		
6 ___	35%	12 ___	65%	18 ___	95%		

12. Est-ce que vous achèteriez les produits d'agriculture qui portent le logo "Cultivé au N.-B."?

1 ____ OUI 2 ____ NON

13. Pourquoi pas?

1 ____ sa depend de la qualité et du prix

2 ____ préférez autre produits

3 ____ c'est la même chose

4 ____ n'a pas répondu

14. Sexe du répondant:

1 ____ Male 2 ____ Fémale

---

15. Ville _____ No. Téléphone _____

MarCom Incorporated

SURVEY #3

NEW BRUNSWICK DEPARTMENT OF AGRICULTURE & RURAL DEVELOPMENT

"N. B. GROWN" ADVERTISING EFFECTIVENESS SURVEY

NAME _____

PHONE # _____

STREET _____

CITY _____

Hello.

Is this the _____ residence?

(IF NO, The number I was calling is _____ _____ and it was for _____

(IF WRONG NUMBER, TERMINATE WITH, e.g.: I am sorry to have bothered you.)

This is _____ of MarCom Incorporated. We are conducting a survey on agricultural food products. Your telephone number was drawn in a random sample of the _____ area.

May I speak with the person who does most of the food purchasing for your household?

Would that be you?

YES

NO → May I speak with that person?

YES

NO → IF THE SELECTED PERSON IS NOT HOME, THANK THE PERSON YOU ARE TALKING TO AND HANG UP.

WHEN SELECTED PERSON ANSWERS REPEAT INTRODUCTION AND START INTERVIEW

(START INTERVIEW)

The questions I need to ask should take only 5 or 6 minutes. But before starting them, I want to mention that I would be happy to answer any questions you might have about the study either now or later. Okay?

We would like to begin by asking you about your buying habits for agricultural food products.

1. Before you purchase agricultural food products, do you generally look to see where they are grown or produced.

NO 1
YES 2

2. Does this make a difference in your choice?

NO 1
YES 2

2(a). Why does this make a difference?

_____

_____

_____

_____

3. I'd like your opinion of New Brunswick agricultural food products. Could you tell me for each of the following categories whether New Brunswick agricultural food products are excellent, good, fair or poor.

	EXCELLENT (1)	GOOD (2)	FAIR (3)	POOR (4)
Quality	_____(1)	_____ (2)	_____ (3)	_____ (4)
Price	_____(1)	_____ (2)	_____ (3)	_____ (4)
Supply	_____(1)	_____ (2)	_____ (3)	_____ (4)

4a. Have you seen any advertising specifically for Prince Edward Island agricultural food products?

b. What about for New Brunswick agricultural food products?

NO 1
YES 2

5.a. Have you seen or heard the slogan, "Our Best Belongs to You" advertised or identified on New Brunswick agricultural food products?

NO 1

YES 2

5.b. Have you seen or heard the slogan, "N. B. Grown" advertised or identified on New Brunswick agricultural food products?

NO 1

YES 2

IF RESPONDENT ANSWERS 'NO' TO BOTH QUESTIONS, GO TO QUESTION 10 ON PAGE 5

6. What kinds of agricultural food products have you seen advertised or identified with the slogans, "N. B. Grown" or "Our Best Belongs To You"? (GIVE A SECOND CHANCE FOR THIS QUESTION BY ASKING" "Any others?")

FRUITS AND VEGETABLES 1

POULTRY 2

DAIRY 3

MEAT 4

HONEY AND MAPLE PRODUCTS... 5

DON'T KNOW 8

REFUSAL 9

7. Where have you seen or heard the slogans advertised or identified? (GIVE A SECOND CHANCE FOR THIS QUESTION BY ASKING: "Anywhere else?")

TELEVISION 1

RADIO 2

NEWSPAPER 3

STORE DISPLAYS 4

GO TO QUESTION 8 ON NEXT PAGE

ON THE PACKAGING 5

GO TO QUESTION 9 PAGE 5

OTHER 6

DON'T KNOW 8

REFUSAL 9

7a. Generally, what do you recall about the advertising?

_____

_____

ASK THE FOLLOWING MEDIA RECALL QUESTIONS ONLY FOR THE MEDIA IDENTIFIED IN QUESTION 7.

8. What do you recall about the television advertisement?

LOGO SYMBOL 1
SLOGAN 2
WORDING 3
VISUALS 4
MUSIC 5
OTHER 6
DON'T KNOW 8
REFUSAL 9

The Radio Advertisement:

SLOGAN 1
WORDING 2
LYRICS 3
MUSIC 4
OTHER 5
DON'T KNOW 8
REFUSAL 9

The Newspaper Advertisement:

LOGO SYMBOL 1
SLOGAN 2
WORDING 3
OTHER 4
DON'T KNOW 8
REFUSAL 9

The Store Displays:

LOGO SYMBOL 1
SLOGAN 2
BANNERS 3
PRICE CARDS 4
OTHER 5
DON'T KNOW 8
REFUSAL 9

9. When did you last see or hear the slogans"N. B. Grown" or "Our Best Belongs To You" advertised or identified?

_____

_____

10(a). Could you name the fruits and vegetables you buy that are grown or produced in New Brunswick? (GIVE A SECOND CHANCE FOR THIS QUESTION BY ASKING: "Any others?")

_____

_____

_____

_____

(b). What about Dairy Products? _____

_____

(c). Meat? _____

_____

(d). Poultry & Poultry Products? _____

_____

(e). Other? _____

_____

11. You have just listed for me most of the agricultural food products you buy that are produced in New Brunswick. Could you tell me approximately what percentage of all agricultural food products that you buy are New Brunswick products? _____

Finally, a few questions to classify our respondents.

12. Which of the following age groups would you be in:
(READ EACH GROUP AND GIVE TIME TO RESPOND)

UNDER 20 1
20 TO 39 2
40 TO 49 3
50 OR OVER 4
REFUSAL 9

13. Are you single or married?

SINGLE 1
MARRIED 2
OTHER 3
REFUSAL 9

14. How many people are living in your household?

1 MEMBER 1
2 MEMBERS 2
3 MEMBERS 3
4 MEMBERS 4
5 MEMBERS 5
6 MEMBERS 6
MORE 7
REFUSAL 9

15. What is the occupation of the head of your household?

_____

16. What is the mother tongue of the head of the household? French, English or other?

FRENCH 1
ENGLISH 2
OTHER 3
REFUSAL 9

17. Would your total annual family income be over or under $18,000?

OVER $18,000 1
UNDER $18,000 2
REFUSAL 3
DON'T KNOW X

16(a). Would it be over or under $14,000?

OVER $14,000 4
UNDER $14,000 5
REFUSAL 6

16(b). Would it be over or under $25,000?

OVER $25,000 7
UNDER $25,000 8
REFUSAL 9

18. Thank you very much for your time and cooperation.

---

19. CHECK SEX: MALE 1
FEMALE 2

INTERVIEWER: _____

DATE: _____

MarCom Incorporated

SURVEY #3

Nom: _____

Téléphone: _____

Rue: _____

Ville: _____

Introduction

Bonjour: - Est-ce que c'est la résidence _____?
(Si non, le numéro que je désire est _____et c'était une appel pour _____).
(SI VOUS COMPOSEZ UN MAUVAIS NUMERO, TERMINEZ L'APPEL PAR EXEMPLE: Je m'excuse de vous avoir déranger).

- Ici _____de MarCom Incorporated. Nous faisons une recherche sur les aliments d'agriculture. Votre numéro de téléphone à été choisi par échantillon hazard, pour représenter la région _____.

- Est-ce que je peux parler avec celle ou celui qui fait l'achat des aliments pour votre maisonnée?
- Est-ce que c'est vous?

Oui
Non → Est-ce que je peux parler à cette personne?
Oui
Non → SI LE REPRESENTATIF N'EST PAS CHEZ LUI' REMERCIE LA PERSONNE A QUI VOUS PARLEZ ET RACCROCHEZ LE RECEPTEUR.
→ QUAND LE REPRESENTATIF REPOND AU TELEPHONE' COMMENCEZ PAR L'INTRODUCTION PRECEDENTE ET PUIS L'INTERVIEW.

INTERVIEW

→ Nous apprécirions avoir un peu de votre temp pour répondre à quelques questions. Ceci prendra environs 5 à 6 minutes, si vous êtes d'accord à participer.

1. Continuer _____ 2. Terminer _____

- Avant de vous poser nos questions, j'aimerais vous dire que ça nous fait plaisir de répondre n'importe quelles questions que vous avez au sujet de notre recherche.

- On va commencer par vous demandez des questions au sujet de votre habitude d'achat pour des produits d'agriculture.

1. Est-ce que vous regardez l'endroit d'origine des produits d'agriculture que vous achetez.

1. Non _____
2. Oui _____

2. Est-ce que ceci fait une difference dans votre choix?

1. Non _____
2. Oui _____

2a) Pourquoi est-ce que ceci fait une différence?

3. Quels sont vos impressions des aliments d'agriculture produit au Nouveau-Brunswick (N.-B.) en relation de leur.

	Excellent (1)	Bon (2)	Raisonable (3)	Mauvais (4)
Qualité	1	2	3	4
Prix	1	2	3	4
Disponibilité	1	2	3	4

4.a) Avez-vous vu des annonces sur les produits d'agriculture de l'île du Prince-Edouard

b) Et pour le N.-B.?
Non 1
Oui 2

5.a) Avez-vous vu ou entendu le devise (logo) "des produit de choix pour vous" annoncer ou marquer sur les produits d'agriculture du N.-B.?
Non 1
Oui 2

b) Avez-vous vu ou entendu la devise (logo) "Cultivé au N.-B." annoncer ou marquer sur les produits d'agriculture du N.-B.?
Non ....1 - sauter à question 10
Oui 2

6. Quelle sorte de produits d'agriculture avez-vous vu ou entendu soit annoncé ou marqué avec les devises (logos) "Cultiré au N.-B." ou "des produits de choix pour vous".
(ENCOURAGEZ D'AUTRE REPONSE EN DEMANDANT: "Est-ce qu'il ya d'autres?")

FRUITS ET LEGUMES	1
VOLAILLE	2
PRODUITS LAITIERS	3
VIANDE	4
MIEL ET PRODUITS D'ERABLES	5
NE SAIT PAS	8
N'A PAS REPONDU	9

7. Où avez-vous entendu ou vu les devises (logo) annoncer ou marquer?
(ENCOURAGEZ D'AUTRE REPONSE EN DEMANDANT: "Est-ce qu'il ya d'autre moyen?"

Sauter à question 8	TELEVISION	1
	RADIO	2
	JOURNAL	3
	ETALAGE AU MAGASIN	4
Sauter à question 9	SUR LE PAQUET	5
	AUTRE	6
	NE SAIT PAS	8
	N'A PAS REPONDU	9

7.a) Au sujet des annonces, de quoi vous vous en souvenez?

8. SEULEMENT POUR LE MEDIA QU'IL A NOMME, DEMANDEZ LES QUESTIONS SUIVANTES.

a) C'est quoi que vous vous souvenez des annonces à la télévision?

LE SYMBOLE DU LOGO	1
LES DEVISES (SLOGAN)	2
LES MOTS	3
LA VISUALISATION	4
LA MUSIQUE	5
AUTRE	6
NE SAIT PAS	8
N'A PAS REPONDU	9

b) C'est quoi que vous vous souvenez des annonces à la radio?

LES DEVISES (SLOGAN)	1
LES MOTS	2
LES PAROLES LYRIQUE	3
LA MUSIQUE	5
AUTRE	6
NE SAIT PAS	8
N'A PAS REPONDU	9

c) C'est quoi que vous vous souvenez des annonces dans le journal

LE SYMBOLE DU LOGO	1
LES DEVISES (SLOGAN)	2
LES MOTS	3
AUTRE	4
NE SAIT PAS	8
N'A PAS REPONDU	9

d) C'est quoi que vous vous souvenez des annonces ou les étalages au magasin?

LE SYMBOLE DU LOGO	1
LES DEVISES (SLOGAN)	2
LES AFFICHES	3
CARTES DE PRIX	4
AUTRE	5
NE SAIT PAS	8
N'A PAS REPONDU	9

9. Quand avez-vous entendu ou vu les devises (logo) "cultivé au N.-B." et "des produits de choix pour vous" annoncé ou marqué?.

10. a) Pouvez-vous nommer les fruits et les légumes que vous achetez qui sont cultivés ou produits au N.-B.?
ENCOURAGEZ D'AUTRE REPONSE EN DEMANDANT:
Est-ce qu'il y en a d'autres?

b) Et pour les produits laitier?

c) Viande?

d) Volaille?

e) Autre?

11. À peu près quel pourcentage des aliments d'agriculture que vous achetez sont cultivé ou produit au N.-B.?
_____%

À cette fin, je vais vous demandez des questions pour nous assister à faire la classification de nos représentatifs

12. Etes-vous?

Sous 20 ans	1
Entre 20-39	2
Entre 40-49	3
50 et plus	4
N'a pas répondu	9

13. Etes-vous?

Célébataire	1
Marrier	2
Autre	3
N'a pas répondu	9

14. Combien de membre y a-t-il dans votre famille?

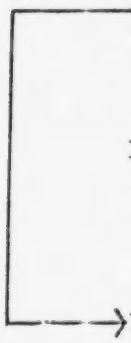
1 membre	1
2 membres	2
3 membres	3
4 membres	4
5 membres	5
6 membres	6
plus que 6	7
n'a pas répondu	9

15. Quel est le travail du chef de votre famille?

16. Quelle est la langue maternelle du chef de votre famille? Français, Anglais, ou autre?

FRANCAIS	1
ANGLAIS	2
AUTRE	3
N'A PAS REPONDU	9

17. Est-ce que le total du revenue annuel pour votre famille est au dessus or dessous $18,000?



AU DESSUS	1
DESSOUS	2
N'A PAS REPONDU	3
NE SAIT PAS	X

16 (a) Est-ce qu'il est au dessus ou dessous $14,000?

AU DESSUS	4
DESSOUS	5
N'A PAS REPONDU	6

16 (b) Est-ce qu'il est au dessus ou dessous $25,000?

AU DESSUS $25,000	7
DESSOUS $25,000	8
N'A PAS REPONDU	9

18. Je veux vous remercier pour votre temps et votre co-opération.

10. Sexe:

MÂLE :	1
FEMELLE:	2

INTERVIEWER: _____

DATE: _____

APPENDIX "B"

MarCom Incorporated

NEW BRUNSWICK DEPARTMENT OF AGRICULTURE & RURAL DEVELOPMENT
"N.B. GROWN" ADVERTISING EFFECTIVENESS SURVEY
RETAILER'S QUESTIONNAIRE

STORE NAME _____

PHONE NUMBER _____

STREET _____

CITY _____

Respondents Position: MANAGER _____
ASSISTANT MANAGER _____
PRODUCE MANAGER _____

INTRODUCTION AND EXPLANATION OF SURVEY.

1. Do your customers ever ask specifically for N.B. Agricultural Food Products?

No ....1 (If no, go to question 3)
Yes 2

Comments:

2. What N.B. Agricultural Food Products are requested the most?

Fruits and Vegetables 1
Dairy Products 2
Meat 3
Poultry and Poultry Products 4
Other 5

Comments:

3. I would like to know your opinions of New Brunswick Agricultural Food Products. Could you tell me for each of the following categories whether New Brunswick Agricultural Food Products are excellent, good, fair or poor.

	EXCELLENT (1)	GOOD (2)	FAIR (3)	POOR (4)
Quality	_____(1)	_____(2)	_____(3)	_____(4)
Price	_____(1)	_____(2)	_____(3)	_____(4)
Supply	_____(1)	_____(2)	_____(3)	_____(4)

Comments:

4. Have you seen or heard any advertising specifically for New Brunswick Agricultural Food Products?

No 1
Yes 2

Comments:

5. Have you seen or heard the slogans "N.B. Grown" or "Our Best Belongs To You" advertised or identified on New Brunswick Agricultural Food Products? (If no to both questions, go to Question 9).

N.B. Grown: No 1
Yes 2

Our Best Belongs To You: No 1
Yes 2

Comments:

6. Where have you seen or heard the slogan advertised or identified?

Television.....1
Radio.....2
Newspaper.....3
Store Displays.....4
On The Packaging.....5
Other.....6
Don't Know.....7
Refusal.....8

7. Generally what do you recall about the advertising?

(Ask this question of Sobey's, Save-Easy and Dominion only)

8. (a) Did you use the "N.B. Grown" point of purchase material available from the New Brunswick Department of Agriculture?

No ....1 (If no go to question 9)
Yes 2

(b) Do you feel the point of purchase material was effective?

No 1
Yes 2

Comments:

9. Did you perceive any changes in buyer behavior in 1980 towards New Brunswick Agricultural Food Products?

No 1
Yes 2

Comments:

10. (a) Approximately what percentage of fruits and vegetables that you sell are grown or produced in New Brunswick? ____%

(b) What percentage of dairy products? ____%

(c) Meat? ____%

(d) Poultry and poultry products? ____%

11. (a) What form of advertising is or could be most effective in promoting agricultural food products in your opinion?

(b) What message or messages do you feel should be conveyed when advertising New Brunswick Agricultural Food Products?

APPENDIX "C"

CONSUMER SURVEY # 2

Q. 1 RESPONDENT WITH/WITHOUT LOCATIONAL PREFERENCE
(BY MOTHER TONGUE)

	TOTAL	FRENCH	ENGLISH
Total Interviews	207 (100%)	46 (100%)	161 (100%)
Yes	136 (65.7%)	22 (47.8%)	111 (70.8%)
No	70 (33.82%)	24 (52.2%)	46 (28.6%)
No Answer	1 (.48%)	0 (0.0%)	1 (0.6%)

N.B. Results Compiled By MarCom Incorporated, January 1981.

Q. 1 Before you purchase agricultural products, do you generally look to see where they are from?

CONSUMER SURVEY # 2

Q. 2 RESPONDENTS' CHOICE INFLUENCED BY SOURCE OF SUPPLY
(BY MOTHER TONGUE)

	TOTAL	FRENCH	ENGLISH
Total Interviews	207 (100%)	46 (100%)	161 (100%)
Yes	116 (56%)	16 (34.8%)	100 (62.1%)
No	90 (43.5%)	30 (65.2%)	60 (37.3%)
No Answer	1 (0.5%)	0 (0.0%)	1 (0.6%)

N.B. Results Compiled By MarCom Incorporated, January 1981.

Q. 2 Does this make a difference in your choice?

CONSUMER SURVEY # 2

Q. 3 RESPONDENTS' PREFERRED SOURCE OF SUPPLY* (BY MOTHER TONGUE)

	TOTAL	FRENCH	ENGLISH
Total Interviews	207 (100%)	46 (100%)	161 (100%)
Canadian	11 (5.3%)	12 (2.2%)	10 (6.2%)
Local or New Brunswick	76 (36.7%)	9 (19.6%)	67 (41.6%)
Atlantic or Maritime	13 (6.3%)	4 (8.7%)	9 (5.6%)
Other	21 (10.1%)	3 (6.5%)	18 (11.2%)
Did Not Answer	85 (41.5%)	29 (63.0%)	57 (35.1%)

N.B. Results Compiled By MarCom Incorporated, January 1981.

* The answer categories for this question are based on verbatim replies. The other category includes all other verbatim replies.

Q. 4 Why does this make a difference?

CONSUMER SURVEY # 2

Q. 4(a) QUALITY IMAGE OF
N.B. AGRICULTURAL FOOD PRODUCTS
(BY MOTHER TONGUE)

	TOTAL	FRENCH	ENGLISH
Total Interviews	207 (100%)	46 (100%)	161 (100%)
Excellent	39 (18.8%)	9 (19.6%)	30 (18.6%)
Good	144 (69.6%)	29 (63.0%)	115 (71.4%)
Fair	14 (6.8%)	6 (13.0%)	8 (5.0%)
Poor	0 (0.0%)	0 (0.0%)	0 (0.0%)
No Answer	10 (4.8%)	2 (4.3%)	8 (5.0%)

N.B. Results Compiled By MarCom Incorporated, January 1981.

Q. 4(a) What are your impressions of New Brunswick agricultural food products in relation to quality?

CONSUMER SURVEY # 2

Q. 4(b) PRICE IMAGE OF
N.B. AGRICULTURAL FOOD PRODUCTS
(BY MOTHER TONGUE)

	TOTAL	FRENCH	ENGLISH
Total Interviews	207 (100%)	46 (100%)	161 (100%)
Excellent	1 (0.5%)	1 (2.2%)	0 (0.0%)
Good	96 (46.4%)	17 (37.0%)	79 (49.1%)
Fair	94 (45.4%)	24 (52.2%)	70 (43.5%)
Poor	6 (2.9%)	0 (0.0%)	6 (3.7%)
No Answer	10 (4.8%)	4 (8.7%)	6 (3.7%)

N.B. Results Compiled by MarCom Incorporated, January 1981.

Q. 4(b) What are your impressions of New Brunswick agricultural food products in relation to price?

CONSUMER SURVEY # 2

Q. 4(c) SUPPLY IMAGE OF
N.B. AGRICULTURAL FOOD PRODUCTS
(BY MOTHER TONGUE)

	TOTAL	FRENCH	ENGLISH
Total Interviews	207 (100%)	46 (100%)	161 (100%)
Excellent	10 (4.8%)	0 (0.0%)	10 (6.2%)
Good	132 (63.8%)	26 (56.5%)	106 (65.8%)
Fair	50 (24.2%)	17 (37.0%)	33 (20.5%)
Poor	2 (1.0%)	0 (0.0%)	2 (1.2%)
No Answer	13 (6.3%)	3 (6.5%)	10 (6.2%)

N.B. Results Compiled By MarCom Incorporated, January 1981.

Q. 4(c) What are your impressions of New Brunswick agricultural food products in relation to supply?

CONSUMER SURVEY # 2

Q. 5 RECALL "N.B. GROWN"
(BY MOTHER TONGUE)

	TOTAL	FRENCH	ENGLISH
Total Interviews	207 (100%)	46 (100%)	161 (100%)
Yes	43 (20.8%)	6 (13.0%)	37 (23.0%)
No	163 (78.7%)	39 (84.8%)	124 (77.0%)
No Answer	1 (0.5%)	1 (2.2%)	0 (0.0%)

N.B. Results Compiled By MarCom Incorporated, January 1981.

Q. 5 Have you seen the logo, "N. B. Grown", advertised or identified on New Brunswick agricultural food products?

CONSUMER SURVEY # 2

Q. 6 RESPONDENTS' RECALL OF AGRICULTURAL FOOD PRODUCTS ADVERTISED (BY MOTHER TONGUE)

	TOTAL	FRENCH	ENGLISH
Total Interviews	207 (100%)	46 (100%)	161 (100%)
Fruits & Vegetables	39 (18.8%)	6 (13.0%)	33 (20.5%)
Poultry	-	-	-
Dairy	-	-	-
Meat	-	-	-
Honey & Maple Products	-	-	-
Did Not Reply	4 (1.9%)	0	4 (2.5%)

N.B. Results Compiled By MarCom Incorporated, January 1981.

Q. 6 What kinds of agricultural food products have you seen advertised or identified with the logo, "N. B. Grown"?

CONSUMER SURVEY # 2

Q. 7 SOURCE OF MEDIA RECALL
(BY MOTHER TONGUE)

	TOTAL	FRENCH	ENGLISH
Total Interviews	207 (100%)	46 (100%)	161 (100%)
Television	0	0	0
Radio	1 (0.5%)	1 (2.2%)	0
Newspaper	8 (3.9%)	1 (2.2%)	7 (4.3%)
Point of Sale Material	38 (18.4%)	5 (10.9%)	33 (20.5%)
On The Packaging	2 (1.0%)	0	2 (1.2%)
Other	0	0	0
Did Not Reply	0	0	0

N.B. Results Compiled By MarCom Incorporated, January 1981.

Q. 7 Where have you seen or heard the Logo advertised or identified?

CONSUMER SURVEY # 2

Q. 8(a) RADIO ADVERTISING RECALL
(BY MOTHER TONGUE)

	TOTAL	FRENCH	ENGLISH
Total Interviews	207 (100%)	46 (100%)	161 (100%)
Wording	-	-	-
Lyrics	-	-	-
Music	-	-	-
Other	-	-	-
Nothing	2 (1%)	2 (4.3%)	0
Did Not Reply	-	-	-

N.B. Results Compiled By MarCom Incorporated, January 1981.

Q. 8(a) What do you recall about the radio advertisement?

CONSUMER SURVEY # 2

Q. 8(b) NEWSPAPER ADVERTISING RECALL
(BY MOTHER TONGUE)

	TOTAL	FRENCH	ENGLISH
Total Interviews	207 (100%)	46 (100%)	161 (100%)
Logo Symbol	4 (1.9%)	0	4 (2.5%)
Logo Slogan	2 (1.0%)	0	2 (1.2%)
Wording	3 (1.4%)	0	3 (1.9%)
Other	0	0	0
Nothing	1 (1.9%)	0	1 (2.5%)
Did Not Reply	0	0	0

N.B. Results Compiled By MarCom Incorporated, January 1981.

Q. 8(b) What do you recall about the newspaper advertisement?

CONSUMER SURVEY # 2

Q. 8(c) POINT OF SALE ADVERTISING RECALL
(BY MOTHER TONGUE)

	TOTAL	FRENCH	ENGLISH
Total Interviews	207 (100%)	16 (100%)	161 (100%)
Logo Symbol	27 (13.0%)	3 (6.3%)	24 (14.9%)
Logo Slogan	4 (1.9%)	0	4 (2.5%)
Banners	2 (1.0%)	0	2 (1.2%)
Price Cards	5 (1.1%)	0	5 (1.9%)
Other	0	0	0
Nothing	11 (5.3%)	1 (2.2%)	10 (6.2%)
Did Not Reply	1 (0.5%)	1 (2.2%)	0

N.B. Results Compiled By MarCom Incorporated, January 1981.

Q. 8(c) What do you recall about the point of sale material?

CONSUMER SURVEY # 2

Q. 9 WHEN RESPONDENTS LAST RECALL ADVERTISING
(BY MOTHER TONGUE)

	TOTAL	FRENCH	ENGLISH
Total Interviews	207 (100%)	16 (100%)	161 (100%)
Last Fall	0	0	0
Regularly	1 (0.5%)	0	1 (0.6%)
Summer	0	0	0
Few Weeks Ago	11 (5.3%)	1 (2.2%)	10 (6.2%)
Last Winter	0	0	0
Few Months Ago	1 (0.5%)	0	1 (0.6%)
Last Week	3 (1.4%)	1 (2.2%)	2 (1.2%)
At Night	0	0	0
Few Days Ago	5 (2.4%)	0	5 (3.1%)
Did Not Reply	3 (1.4%)	3 (6.3%)	0

N.B. Results Compiled By MarCom Incorporated, January 1981.

Q. 9 When did you see or hear the logo, "N.B. Green" advertised or identified?

CONSUMER SURVEY # 2

Q. 10(a) N.B. FRUITS AND VEGETABLES PURCHASED
(BY MOTHER TONGUE)

	TOTAL	FRENCH	ENGLISH
Total Interviews	207 (100%)	46 (100%)	161 (100%)
Cherries	6 (2.9%)	0	6 (3.7%)
Blueberries	17 (8.2%)	2 (4.3%)	15 (9.3%)
Don't Know	9 (4.3%)	0	9 (5.6%)
Mushrooms	2 (1.0%)	0	2 (1.2%)
Cabbage	38 (18.4%)	13 (28.3%)	25 (15.5%)
Turnip	49 (23.7%)	11 (23.9%)	38 (23.6%)
Broccoli	39 (18.8%)	4 (8.7%)	35 (21.7%)
Corn	40 (19.3%)	5 (10.9%)	35 (21.7%)
Cauliflower	19 (9.2%)	0 (0.0%)	19 (11.8%)
Greens	3 (1.4%)	0 (0.0%)	3 (1.9%)
Squash	17 (8.2%)	5 (10.9%)	12 (7.5%)
Lettuce	38 (18.4%)	9 (19.6%)	29 (18.0%)

CONSUMER SURVEY # 2

Q. 10(a) N.B. FRUITS AND VEGETABLES PURCHASED (CON'T)
(BY MOTHER TONGUE)

	TOTAL	FRENCH	ENGLISH
Celery	20 (9.7%)	2 (4.3%)	18 (11.2%)
Peppers	17 (8.2%)	3 (6.5%)	11 (8.7%)
Onions	28 (13.5%)	5 (10.9%)	23 (14.5%)
Did Not Reply	3 (1.4%)	2 (4.3%)	1 (0.6%)
Radishes	6 (2.9%)	2 (4.3%)	4 (2.5%)
Swiss Chard	9 (4.3%)	1 (2.2%)	8 (5.0%)
Pears	4 (1.9%)	0 (0.0%)	4 (2.5%)
Parsley	1 (0.5%)	0 (0.0%)	1 (0.6%)
Pumpkin	1 (0.5%)	0 (0.0%)	1 (0.6%)
Carrots	120 (58%)	27 (58.7%)	93 (57.8%)
Strawberries	34 (16.4%)	5 (10.9%)	29 (18.0%)
Potatoes	133 (64.3%)	28 (60.9%)	105 (65.2%)
Rhubarb	2 (0.5%)	0 (0.0%)	2 (1.2%)

CONSUMER SURVEY # 2

Q. 10(a) N.B. FRUITS AND VEGETABLES PURCHASED (CON'T)
(BY MOTHER TONGUE)

	TOTAL	FRENCH	ENGLISH
Peas	41 (19.8%)	7 (15.2%)	34 (21.1%)
Brussel Sprouts	7 (3.4%)	0 (0.0%)	7 (4.3%)
Beans	77 (37.2%)	17 (37.0%)	60 (37.3%)
Beets	21 (10.1%)	9 (19.6%)	12 (7.5%)
Cucumbers	64 (30.9%)	11 (23.9%)	53 (32.9%)
Parsnips	4 (1.9%)	0 (0.0%)	4 (2.5%)
Tomatoes	76 (36.7%)	15 (32.6%)	61 (37.9%)
Spinach	8 (3.9%)	1 (2.2%)	7 (4.3%)
Apples	83 (40.1%)	11 (23.9%)	72 (44.7%)
Raspberries	11 (5.3%)	2 (4.3%)	9 (5.6%)
Home Garden	30 (14.5%)	7 (15.2%)	23 (14.3%)

N.B. Results Compiled By MarCom Incorporated, January 1981.

Q. 10(a) Could you name the fruits and vegetables you buy that are grown or produced in New Brunswick?

CONSUMER SURVEY # 2

Q. 10(b) N.B. DAIRY PRODUCTS PURCHASED
(BY MOTHER TONGUE)

	TOTAL	FRENCH	ENGLISH
Total Interviews	207 (100%)	16 (100%)	161 (100%)
Milk	197 (95.2%)	10 (87.0%)	157 (97.5%)
Butter	134 (64.7%)	24 (52.2%)	110 (68.3%)
Cheese	148 (71.5%)	29 (63.0%)	119 (73.9%)
Ice Cream	81 (39.1%)	16 (34.8%)	65 (40.4%)
Sour Cream	3 (1.4%)	0 (0.0%)	3 (1.9%)
Cream	21 (10.1%)	7 (15.2%)	14 (8.7%)
Yogurt	23 (11.1%)	4 (8.7%)	19 (11.8%)
Cottage Cheese	14 (6.8%)	2 (4.3%)	12 (7.5%)
Margarine	2 (1.0%)	0	2 (1.2%)
No Reply	7 (3.4%)	0	7 (4.3%)

N.B. Results Compiled By MarCom Incorporated, January 1981.

Q. 10(b) Could you name the dairy products you buy that are grown or produced in New Brunswick?

CONSUMER SURVEY # 2

Q. 10(c) N.B. MEAT PURCHASED (BY MOTHER TONGUE)

	TOTAL	FRENCH	ENGLISH
Total Interviews	207 (100%)	46 (100%)	161 (100%)
Beef	131 (63.3%)	32 (69.6%)	99 (61.5%)
Pork	37 (16.9%)	28 (60.9%)	69 (42.9%)
Veal	6 (2.9%)	0 (0.0%)	6 (3.7%)
No Reply	60 (29%)	5 (10.9%)	55 (34.2%)
Grow Their Own	2 (1.0%)	0 (0.0%)	2 (1.2%)

N.B. Results compiled By MarCom Incorporated, January 1981.

Q. 10(c) *Could you name the meat you buy that is grown or produced in New Brunswick?*

CONSUMER SURVEY # 2

Q. 10(d) N.B. POULTRY
AND POULTRY PRODUCTS PURCHASED
(BY MOTHER TONGUE)

	TOTAL	FRENCH	ENGLISH
Total Interviews	207 (100%)	46 (100%)	161 (100%)
Chicken	166 (80.2%)	38 (82.6%)	128 (79.5%)
Eggs	153 (73.9%)	30 (65.2%)	123 (76.4%)
No Reply	25 (12.1%)	7 (15.2%)	19 (11.8%)
Turkey	43 (20.8%)	9 (19.6%)	34 (21.1%)
Grow Their Own	1 (0.5%)	0 (0.0%)	1 (0.6%)

N.B. Results Compiled By MarCom Incorporated, January 1981.

Q. 10(d) Could you name the poultry and poultry products you buy that are grown or produced in New Brunswick?

CONSUMER SURVEY # 2

Q. 10(c) *OTHER N.B. PRODUCTS PURCHASED
(BY MOTHER TONGUE)

	TOTAL	FRENCH	ENGLISH
Total Interviews	207 (100%)	46 (100%)	161 (100%)
No Reply	204 (98.6%)	46 (100%)	158 (98.1%)
Honey	2 (1.0%)	0 (0.0%)	2 (1.2%)
Maple Syrup	1 (0.5%)	0 (0.0%)	1 (0.6%)

*Others would include all agricultural food products which are not either fruits, vegetables, dairy products, meat, or poultry and poultry products.

N.B. Results Compiled by MarCom Incorporated, January 1981.

Q. 10(c) *Could you name any other products you buy that are grown or produced in New Brunswick?*

CONSUMER SURVEY # 2

Q. 11 % OF N.B. FOOD PRODUCTS PURCHASED (BY MOTHER TONGUE)

	TOTAL	FRENCH	ENGLISH
Total Interviews	207 (100%)	46 (100%)	161 (100%)
0 - 15	11 (5.0%)	5 (11.0%)	6 (4.0%)
16 - 30	48 (23.0%)	11 (24.0%)	37 (23.0%)
31 - 45	52 (25.0%)	18 (39.0%)	34 (21.0%)
46 - 60	35 (17.0%)	7 (15.0%)	28 (17.0%)
61 - 75	34 (16.4%)	2 (4.0%)	32 (20.0%)
76 - 90	11 (5.3%)	0 (0.0%)	11 (7.0%)
91 - 104	0 (0.0%)	0 (0.0%)	0 (0.0%)
No Reply	16 (8.0%)	3 (7.0%)	13 (8.0%)

N.B. Results Compiled By MarCom Incorporated, January 1981.

Q. 11 Approximately what percentage of agricultural food products that you buy are produced or grown in New Brunswick?

POOR

QUALITY

ORIGINAL